

CERTIFIED FUND SPECIALIST (CFS)



**Ramaq
Chools**
Consulting & Training

Email: info@ramaqchools.com

Phone: +966536834733

Website: ramaqchools.com

Contents

- 1. Introduction to Certified Fund Specialist**
- 2. Why Choose Chools**
- 3. Who Can Apply?**
- 4. Program Overview**
- 5. Program Objectives and Expected Outcomes**
- 6. Skills Learned**
- 7. Program Outline**
- 8. Enrollment Information**



Introduction to Certified Fund Specialist

Imagine being the go-to expert in mutual fund investing, helping clients navigate the intricate world of pooled investments with confidence and precision. The Certified Fund Specialist (CFS) designation is designed for financial advisors who specialize in mutual funds and other pooled investments. This course equips you with the knowledge and skills necessary to excel in this field and prepares you for the CFS exam. The course covers topics such as fund analysis and selection, asset allocation and portfolio construction, and advanced investment strategies, ultimately enabling you to serve your clients better in the area of mutual fund investing.



Why Choose Chools?

Numbers That Speak for Themselves:

- **10,000+ Successful Alumni:** Join a network of impactful professionals.
- **95% Job Placement Rate:** Secure your future with Chools' proven track record.
- **20+ Years of Excellence:** Trust in a legacy of education and industry expertise.
- **200+ Industry Partnerships:** Leverage our connections for real-world insights and opportunities.

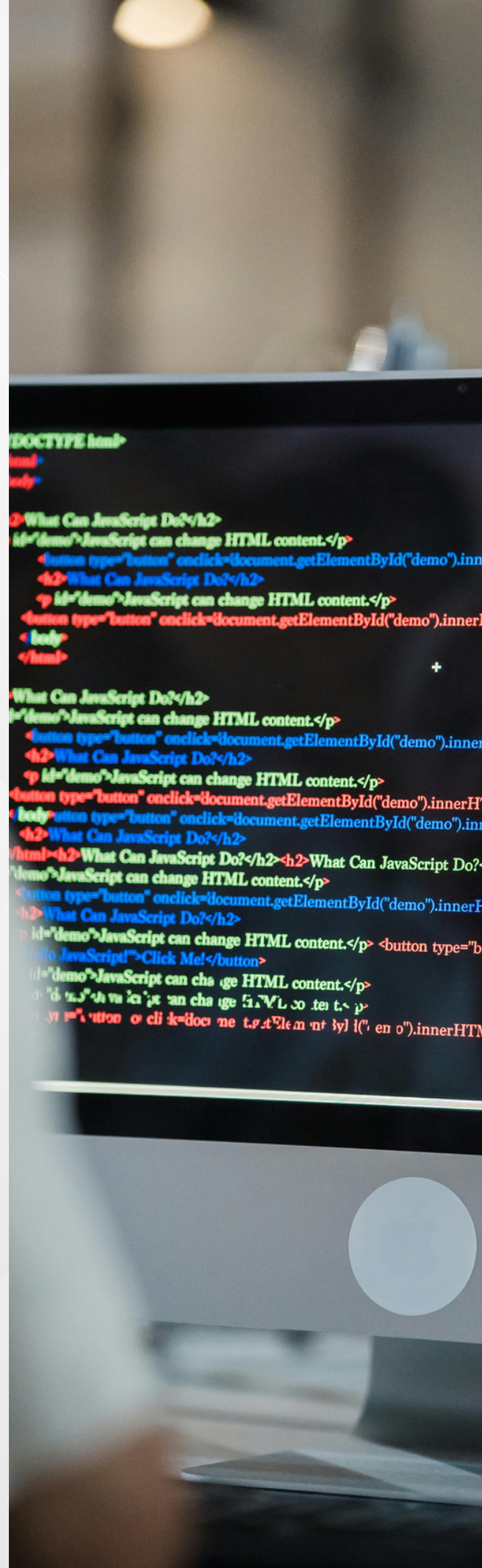
What Sets Us Apart?

- **Expert Instructors:** Learn from industry veterans with hands-on experience.
- **Hybrid Learning Model:** Balance online flexibility with in-person engagement.
- **Comprehensive Curriculum:** Stay ahead with courses designed meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

Who Can Apply?

Eligibility Criteria:

- Bachelor's degree or 2,000 hours of financial services work experience.



- 
- Completion of a study program consisting of six modules and a written case study.
 - Passing three online exams with a score of at least 80% to earn the CFS credential

Program Overview

The CFS Program provides a comprehensive education in mutual fund investing and advanced investment strategies. Our curriculum covers a wide range of topics to ensure a thorough understanding, combining theoretical knowledge with practical, hands-on experience.

Learning Mode:

- **Hybrid Learning Model:** Combines online learning with in-person sessions for flexibility and interactive engagement.
- **Interactive Sessions:** Includes live webinars, workshops, and Q&A forums with expert instructors and peers.
- **Self-paced Learning:** Access course materials anytime, allowing you to learn at your own pace.



PROGRAM OBJECTIVES

- Build knowledge and skills in mutual fund investing.
- Understand fund analysis and selection techniques.
- Develop asset allocation and portfolio construction strategies.
- Learn advanced investment strategies.
- Prepare for the Certified Fund Specialist (CFS) exam.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in financial advising and investment management.

EXPECTED OUTCOMES

- Proficiency in mutual fund investing principles and techniques.
- Practical experience through hands-on exercises.
- Strong analytical and problem-solving skills.
- Application of best practices in fund analysis and selection.
- Innovation in understanding and managing investment portfolios.

SKILLS LEARNED

- **Fund Analysis and Selection:** Techniques for analyzing and selecting mutual funds.
- **Asset Allocation:** Strategies for effective asset allocation and portfolio construction.
- **Advanced Investment Strategies:** Learning advanced investment strategies.
- **Portfolio Management:** Managing investment portfolios to meet client objectives.
- **Ethics:** Applying ethical standards and professional conduct in financial advising.
- **Strategic Thinking:** Developing and implementing strategic investment initiatives.
- **Decision-Making:** Making informed decisions based on investment analysis.
- **Communication Skills:** Enhancing communication and interpersonal skills in financial advising contexts.



Program Outline

Required Core Modules

Module 1: Introduction to Mutual Fund Investing

- Basics of mutual fund investing and its importance.

Module 2: Fund Analysis and Selection I

- Techniques for analyzing and selecting mutual funds.

Module 3: Fund Analysis and Selection II

- Advanced fund analysis and selection techniques.

Module 4: Asset Allocation I

- Basics of asset allocation and portfolio construction.

Module 5: Asset Allocation II

- Advanced asset allocation strategies.

Module 6: Advanced Investment Strategies I

- Basics of advanced investment strategies.

Module 7: Advanced Investment Strategies II

- Advanced techniques for investment strategies.

Module 8: Portfolio Management I

- Managing investment portfolios to meet client objectives.

Module 9: Portfolio Management II

- Advanced portfolio management techniques.

Module 10: Financial Ethics

- Understanding and applying ethical standards in financial advising.

Module 11: Scenario and Sensitivity Analysis I

- Basics of performing scenario and sensitivity analysis.

Module 12: Scenario and Sensitivity Analysis II

- Advanced scenario and sensitivity analysis techniques.

Module 13: Communication in Financial Advising I

- Basics of enhancing communication and interpersonal skills in financial advising.

Module 14: Communication in Financial Advising II

- Advanced communication techniques in financial advising.



Program Outline

Module 15: Strategic Investment Management I

- Basics of strategic investment management.

Module 16: Strategic Investment Management II

- Advanced techniques in strategic investment management.

Enrollment Now Open!

Take the first step towards mastering mutual fund investing and earning your CFS credential. Enroll in our **Certified Fund Specialist (CFS)** Program and enhance your career with Chools.