



CONTINUING EDUCATION

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**2009 CALGARY “LEVEL II CFA® REVIEW SEMINAR”
OFFERED BY CONTINUING EDUCATION, THE UNIVERSITY OF CALGARY
COURSE NUMBER: PDS 145-008**

INTRODUCTION

To help Level II CFA® candidates in the Calgary area prepare for their upcoming examination, Continuing Education at The University of Calgary, Western Financial Consulting Ltd. (“WFCL”), and Schweser Study Program (“Schweser”) are pleased to present a Level II CFA® review seminar. The purpose of the seminar is to highlight and consolidate the key ideas from the assigned CFA® program readings. As well, the seminar will provide participants with a versatile framework of analysis for each section of the CFA® program. CFA Institute does not endorse, promote, review or warrant the accuracy of the products or services offered by WFCL or verify or endorse the pass rates claimed by WFCL. CFA® and Chartered Financial Analyst® are trademarks owned by CFA Institute (formerly known as AIMR®, or the Association for Investment Management and Research®).

SEMINAR STUDY MATERIALS

The review seminar will be based upon the CFA Institute readings augmented by lecture notes and practice problems prepared by the seminar instructors. Additionally, if a seminar participant wishes to purchase study materials from Schweser they will be provided with the opportunity to do so. The Schweser materials will include the 2008 Level II Study Note Pack (five study books and Practice Exam Volume 1), Practice Exam Volume 2, SchweserPro Online Question Bank, Free Do-It-Yourself LOS Flashcards, Quicksheet, Faculty Office Hours plus all the online tools (session kick-off, Schweser library, faculty blog, and study planner). Students who purchase the Schweser materials will receive them soon after registration, while additional study materials will be distributed by the instructors during the seminar.

FORMAT OF THE REVIEW SEMINAR

The weekly review seminar will cover all the study sessions required for the CFA® exam; however, increased emphasis will be placed on the areas that are given more weight in the exam. For each session, the instructor will hand out detailed lecture notes, review the session’s key topics, and provide examples to illustrate the type of questions that may be asked on the CFA® exam. There will also be class time devoted to answering participant questions based on the Schweser materials or the in-class materials. To provide assistance after the formal class sessions, seminar participants are encouraged to send E-Mail questions to the seminar instructors who will answer all questions in a timely manner.

WHO SHOULD ATTEND?

The seminar is directed towards serious CFA® candidates, and all participants are expected to have completed and studied all reading assignments prior to each seminar class. The objective of the seminar is to provide a concentrated forum to ensure that all participants maximize their chance of passing the CFA® exam. Class sizes will be strictly limited to ensure that participants receive the level of attention they require.

DATES AND LOCATION

This year’s Level II seminar will offer 14 review classes once a week on Wednesday evenings beginning on January 14th. Each 180-minute class will start at 6:30 PM, will end at 9:15 PM, and will be held at The University of Calgary. Please see the attached schedule for a detailed outline of classes. A mock 6-hour CFA® preparation exam will be offered after the scheduled sessions, on May 2nd, to provide practice in exam writing skills.

WHAT BENEFITS DO YOU RECEIVE FROM THIS SEMINAR?

While the CFA® program of study is designed to be a self-study program, many adult learners find that receiving formalized instruction in many of the complex topic areas is beneficial. If you have decided to purchase the Schweser study materials, you will receive them soon after registration. During the course of the seminar, supplementary notes and a set of over 400 sample questions will be provided to test your understanding of the material. In addition, upon registering you will be provided with the opportunity to submit E-Mail questions to the seminar instructors. This tutorial service is available to you prior to the seminar, during the seminar, and even after the seminar.

COST AND REGISTRATION INFORMATION

The cost of registering for the review seminar, without purchasing the Schweser study materials, is \$795 (this price includes GST). If you wish to register for the review seminar and purchase the Schweser study materials the cost will be \$1,095 (this price includes GST). (If you were a participant in a previous offering of our Level II program and were unsuccessful in passing the exam please call Dr. Robinson to discuss a reduced rate). Registrations for the seminar are handled by Continuing Education, The University of Calgary. Registrations for the seminar are handled by Continuing Education, The University of Calgary. Registration can be completed by phoning 403-220-2988, by faxing or mailing the registration form in the back of Continuing Education January – August Winter 2009 Program Guide Book, or online at conted.ucalgary.ca. (Use Course Search and type in the course number.). Room locations will be contained in the information package sent to registrants. All program registrants will be provided with a tuition tax receipt from the University of Calgary for the course registration fee.

FURTHER DETAILS

If you, or someone else in your firm, require more detailed information please contact Dr. Michael Robinson of WFCL at 403-208-0677, or E-Mail him at wfcl@telusplanet.net.

SEMINAR INSTRUCTORS

Thomas Cottrell, BBA - Accounting, PhD, CPA is a member of the finance area at the Haskayne School of Business of the University of Calgary where he has taught strategy, economics, advanced corporate finance, and M&A to B. Comm, MBA, and Ph.D. students for almost fifteen years. Prior to his academic career, he worked as a CPA for Deloitte and Microsoft, and in recent years he has been part of the expert testimony team for: tax defense for the real-option valuation of US Satellite Broadcasting, three Winstar cases, Independent Distribution Consultants for a multi-million dollar stale trading case, the (until then) largest non-profit bankruptcy in the United States. He currently provides valuation and investment advice for a private equity fund with deals exceeding 20m euros. He received the Commerce Undergraduate Society Award for Outstanding Teaching & Learning for 2004.

Wayne Irvine, BComm, CA, CFA, is a member of the accounting area at the Haskayne School of Business. Prior to this appointment, he worked for twelve years at Price Waterhouse, and was also an instructor at Mount Royal College. Mr. Irvine has many years of experience teaching professional development courses and has taught in CFA® review seminars in Calgary, Toronto, Vancouver and Ottawa for fourteen years. He has also instructed preparatory classes for CMA students, CA students, and has served on education sub-committees for the Chartered Accountants of Alberta. Mr. Irvine was the recipient of the 2000 CA Award for Teaching Excellence.

Michael Robinson, BMath, MBA, PhD, CFA, ICD.D is a member of the finance area at the Haskayne School of Business and has taught economics, quantitative methods, corporate finance, security analysis and portfolio management to B. Comm, MBA, and Ph.D. students for over fifteen years. He received the Dean's Award for Teaching Excellence for 2005/2006. He has also taught at the University of Western Ontario, Wilfrid Laurier University, the Warsaw School of Economics, and the University of Petroleum, Beijing. Dr. Robinson has taught CFA® review seminars in Calgary, Toronto, Vancouver and Ottawa for the last fifteen years.

**SCHEDULE FOR THE 2009 CALGARY “LEVEL II CFA® REVIEW SEMINAR”
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Date	Taught By	Study Sessions	TOPIC
January 14	MR	3	Quantitative Methods for Valuation
January 21	MR	4	Economics for Valuation
January 28	TC	8, 9, 10	Corporate Finance / Basic Valuation Concepts
February 4	TC	11, 12, 13	Equity Investments
February 11	TC	11, 12, 13	Equity Investments
February 18		NONE	NO CLASS: READING WEEK
February 25	TC	14, 15	Debt Investments
March 4	TC	14, 15	Debt Investments
March 11	TC	16, 17	Derivative Investments
March 18	TC	16, 17	Derivative Investments
March 25	WI	5, 6, 7	Financial Statement Analysis
April 1	WI	5, 6, 7	Financial Statement Analysis
April 8	WI	5, 6, 7	Financial Statement Analysis
April 15	MR	18	Portfolio Management
April 22	MR	1, 2	Ethical and Professional Standards
May 2		ALL (9AM-4PM)	MOCK EXAM