MITSloan Executive Education

Investment Management Theory and Practice: A CIMA® Certification Registered Education Program

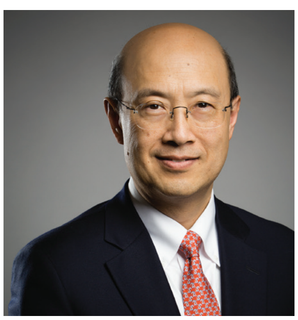
This program is in the Executive Certificate in Management and Leadership track

December 1, 2015–January 29, 2016

Online program.

$3,995

Please visit our website for the most current information.



Program Details

Investment Management Theory and Practice is an online course for investment professionals pursuing the prestigious Certified Investment Management Analyst® (CIMA) certification. Candidates take this course entirely online over a 60-day period immediately preceding a CIMA certification exam testing window. There is no need to travel or spend a week out of the office as this course was built with busy schedules in mind. Participants may study at any time they choose (i.e., weekends, evenings or during the day).

This course, led by industry pioneer Andrew Lo and financial certification specialist Jim Dobbs, includes comprehensive coverage of the topics and learning objectives found in the CIMA Certification Exams Detailed Content Outline (aka: core topics list). This course has been developed to help you better understand the concepts, calculations, and applications found in the CIMA core topics list; help you prepare for and pass the MIT course exam and CIMA certification exam; and help you take your practice to the next level.

Investment Management Theory and Practice walks you through the core topics and learning objectives found in the CIMA certification curriculum line-by-line. This online course uses several learning methods to help participants succeed including: classroom lecture videos, learning modules, exercises and applications, quizzes and a sample test.

Topic coverage includes: ethics and regulation, a review of financial fundamentals (including statistics, time value of money, and economic analysis), risk management, performance measurement and analysis, traditional and alternative investments, portfolio theory and models, behavioral finance, and the investment consulting process (including client discovery, investment policy, portfolio construction and management, manager search and selection, and portfolio review).

This online course reviews financial and investment concepts, theories, models, and strategies. Participants will develop the skills and resources needed to build and manage successful investment portfolios. The faculty team help participants navigate the complex and sometimes confusing world of investment thought and application. Participants will learn to develop investment strategies and portfolios based on client goals and objectives, time horizon, and risk tolerance.

Successful completion of this course satisfies the CIMA certification education requirement.

Takeaways

- Participants should better understand the CIMA curriculum core topics and learning objectives by mastering concepts, calculations, and applications
- Participants should develop tools and resources to help them improve their businesses by immediately applying new strategies and solutions in practice
- Participants should be well prepared to take the MIT course exam and CIMA certification exam by learning from multiple resources including videos, exercises, and practice questions

After completing this course, participants should be able to:

- Perform client discovery more efficiently
- Develop investment policy statements for individual and institutional client
- Identify and measure performance and risk more accurately
- Analyze and recommend appropriate traditional and alternative investments
- Perform successful manager search and selection
- Manage investment portfolios more effectively
- Use research in behavioral finance to better manage client expectations, decisions and relationships
- Develop a formal review and revisions process

http://executive.mit.edu/cima

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Curriculum Overview

(Source: CIMA Certification Exams Detailed Content Outline)

I. Governance
- IMCA Code of Professional Responsibility and Standards of Practice
- Regulatory Considerations

II. Fundamentals
- Statistics and Methods
- Applied Finance and Economics
- Global Capital Markets History and Valuation

III. Portfolio Performance and Risk Measurements
- Attributes of Risk
- Risk Measurements
- Performance Measurement and Attribution

IV. Traditional and Alternative Investments Traditional Global Investments (Equity and Fixed Income)
- Fixed-Income Vehicles
- Foreign Exchange Market
- Alternative Investment
- Options, Futures, and Other Derivatives
- Tools and Strategies Based on Technical Analysis

V. Portfolio Theory and Behavioral Finance
- Portfolio Theories and Models
- Behavioral Finance Theory

VI. Investment Consulting Process Client Discovery
- Investment Policy Statement (IPS)
- Portfolio Risk Management Strategies
- Manager Search, Selection, and Monitoring
- Perform Portfolio Review and Revisions Process

Curriculum Documents
- CIMA Curriculum
- CIMA Formula Sheet

Recommended Study Schedule

Participants are encouraged to study 10 hours a week, or more, depending on existing content knowledge and experience during the 8-9 week course windows. This online program is considered "asynchronous", meaning that participants may work through the course content in any order they choose and at their own pace. Participants must however complete certain course requirements before taking the course exam.

The Learning Experience

This online course uses the following tools and resources to help you learn the material and pass your exams:

- Online learning management system (LMS)
- CIMA Certification Exams Detailed Content Outline
- CIMA Certification Formula Sheet
- CIMA textbook and supplemental readings
- Class lecture videos
- Learning module videos
- Section quizzes
- Sample test

Participants

Ideal candidates for CIMA certification include:

- Investment Advisors
- Investment Consultants
- Financial Advisors
- Financial Planners
- Asset and Wealth Managers
- Financial Services Professionals

Contact Information

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Faculty

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Managing Director, Wealth Management Services, Nuveen Investments

Scott Thayer
CIMA®
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For more information, please contact Program Director Jim Dobbs at cimainfo@mit.edu.