



investment management consultants association

Essentials of Investment Consulting Online Certificate Program

Affordable, Accessible Investment Consulting Education

- Overview
- Demo
- Q&A

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Hosted by:

Lara Davies, IMCA Director of Industry Relations

ldavies@imca.org

IMCA[®]

investment management consultants association

- IMCA was established in 1985 to deliver the premier investment consulting and wealth management credentials and world-class educational offerings—membership, conferences, research, and publications.
- In addition to organizing cutting-edge educational conferences, IMCA also administers the **Certified Investment Management AnalystSM (CIMA[®])** and **Certified Private Wealth AdvisorSM (CPWA[®])** certification programs.

IMCA By The Numbers

(As of March 2011)

- 8,100 members
- Membership renewal rate of 92% annually
- Membership growth rate of 4% annually
- Percentage of members who are “extremely satisfied” with member benefits rose seven percentage points in 2010
 - Average AUM is \$272M
 - Advisor Firm Type: National Full Service Brokerage (61%); Independent B-D, RIA, or Dually Registered (20%); Regional or Bank B-D (17.2%);
 - Experience: 10+ years experience (77%); 20+ years experience (35%)
- More than 6,200 CIMA certificants
- More than 350 CPWA designees
- 2011 IMCA Annual Conference in May; 5 specialty conferences in 2011
- 4,000 conference attendees in 2010

Source: IMCA/Cerulli Associates Advisor surveys, 2010

IMCA's Essentials of Investment Consulting Certificate Program

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3/17/2011

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EIC - February 2011

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Calendar

March 2011

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19

News

February 2011

Welcome to the Essentials of Investment Consulting online learning platform.

The Essentials of Investment Consulting (EIC) program is designed to introduce you to key concepts of investment consulting. This educational program provides you with readings, lectures, and learning exercises.

Upon completion of the EIC program, you should be able to:

- Solve time value of money problems
- Calculate a portfolio's performance and risk using both absolute and relative measurements
- Measure the historical correlation of different investments in a portfolio
- Calculate the mathematical benefit of combining lowly correlated assets in a portfolio
- Identify appropriate benchmarks for proper portfolio evaluation

The program is designed to be completed in approximately 12-15 weeks (about 2.6 hours a week). However, you have 11 months to complete the program.

Quizzes

In order to successfully complete the program, you must pass three quizzes:

- Quiz 1: Math for Investment Consultants (Lessons 1-5)
- Quiz 2: Strategy, Capital Markets and Asset Allocation (Lessons 6-8)
- Quiz 3: Implementation of Investment Policy, Manager Search and Due

Updates

There are no current updates for EIC - February 2011

Bookmarks

My Bookmarks

No bookmarks have been added.

IMCA's EIC Certificate Program

Overview:

- IMCA has developed a certificate program specifically for internal sales desk staff as well as novice financial services professionals who may consider obtaining CIMA certification in the future and wish to enhance their fundamental knowledge of core topics related to the investment consulting process.

Purpose:

- Resource for understanding topics that support the investment consulting process.
- Online learning program for internal sales desk staff to gain a sophisticated understanding of investment consulting.
- Comprehensive certificate program.
- Internal corporate training program that delivers investment consulting knowledge in a customizable online learning platform.
- Tool to help prepare for the CIMA certification program.

IMCA's EIC Certificate Program

Structure:

- The certificate program incorporates a comprehensive set of educational content and self-evaluation tools into an online, self-study environment.
- There are 12 learning modules organized within an online learning center, with each module offering:
 - Written educational content
 - Self-assessment tools such as an application assignment
 - Lecture recordings on key topics presented by subject matter experts
 - There also are three quizzes offered as checkpoints during the 12-module learning path

IMCA's EIC Certificate Program

Modules:

1. Algebra and Statistics
2. Time Value of Money and Rates of Return
3. Fixed Income—Duration and Yield
4. Measuring Risk
5. Performance Measurement
6. Capital Markets
7. Asset Allocation
8. Alternative Investments
9. Investment Policy
10. Manager Search and Selection
11. Due Diligence
12. Portfolio Evaluation

IMCA's EIC Certificate Program

Duration of Course

- All participants will have eleven months from the date of their registration to complete the program.
- Each module is estimated to take 2–3 hours to complete which may vary depending on the level of expertise of the participant.
- Participants can qualify for 7 hours of CE for their CFP® certification.

Pricing:

11-month License Fee

IMCA member

– \$595

Nonmember

– \$795

**Discounts apply for groups of 5 or more.*

IMCA's EIC Certificate Program

Certificate of Completion:

- The certificate program must be completed in its entirety by participants who wish to receive an IMCA Essentials of Investment Consulting “certificate of completion.”
- In order to receive a certificate of completion, a participant must receive a 70 percent passing score on all three online quizzes.

Discounts & Customized Versions for Corporate Training Programs:

- Companies can receive up to 35% off for enrolling groups of employees.
- Customizations include adding company logos, your own content expert, and/or an administrator function .

IMCA Member Benefits

IMCA is the community for advanced investment consulting and wealth management professionals. IMCA members receive a significant return on their \$395 annual investment.

Subscriptions to IMCA's world-class, peer-reviewed educational content:

- *Investments & Wealth Monitor*, a bi-monthly educational magazine;
- *IMCA Research Quarterly*, featuring proprietary, in-depth research analyzed and reported in collaboration with Cerulli Associates;
- *Journal of Investment Consulting*, an academic publication focused on empirical, graduate-level research;
- *IMCA Case Study Connections*, an electronic publication presenting an institutional or high-net-worth client situation along with two potential solutions written by advisors and consultants;
- *Legislative Intelligence*, an electronic newsletter providing updates and information on legislation and regulations;
- *IMCA Insight*, a bi-weekly e-newsletter featuring industry news and educational content.

IMCA Member Benefits

- **Subscription to *BusinessWeek* magazine**
- **Substantial discounts on education and certification offerings**, including conference registration, application and relicensing fees, and *IMCA Audio Broadcasts*.
- **Members-only access to premier Web-based content and resources**, including model RFP forms, customizable questionnaire templates, and hundreds of online peer-reviewed articles.
- **Networking opportunities through IMCA's LinkedIn group**
- **Affinity programs with online content or software providers**, including Horsemouth.com, premium subscription to Roubini.com, and IPS AdvisorPro[®].

What is the value of an IMCA membership?

With an investment of only \$395, IMCA members receive a minimum of \$2,405* in valuable benefits, including:

Annual Return on \$395 IMCA Membership

* Based on the retail value of selected member benefits and discounts.

IMCA Conferences

- **IMCA 2011 New York Consultants Conference**, Attendance—800
February 7-8, 2011, New York, NY
- **IMCA 2011 Spring Specialty Conference**, Attendance—250
March 7-8, 2011, Aventura, FL
- **IMCA 2011 Annual Conference**, Approximate Attendance—1,600 – 2,000
May 16-18, 2011, Las Vegas, NV
- **IMCA 2011 Advanced CIMA[®] Workshop: The Best of Wharton**, Approximate Attendance—225
July 18-19, 2011, Philadelphia, PA
- **IMCA 2011 Advanced Wealth Management Conference**, Approximate Attendance—450
October 10-11, 2011, Chicago, IL
- **IMCA 2011 Winter Specialty Conference**, Approximate Attendance—200
December 5-6, 2011, Vail, CO

In a recent survey, the majority of IMCA members rated IMCA conferences “better” or “much better” than other industry events.

Best of IMCA Advanced IMCA Content Delivered Locally

New this year, IMCA is offering “Best of IMCA” workshops in addition to its national and specialty conferences. This series of six one-day seminars was created in collaboration with top finance faculty of The Wharton School, University of Pennsylvania and leading investment and wealth advisory practitioners. Best of IMCA seminars are approved for up to 6 hours of CIMA®, CPWA® and CFP® (pending approval) continuing education credit.

Six locations have been selected for the 2011 series launch and include:

- **Toronto, Ontario, Canada** – *April 12*
- **Vienna, VA (Washington, DC area)** – *April 27*
- **Irvine, CA (Los Angeles, CA area)** – *June 1*
- **Dallas, TX** – *June 23*
- **Houston, TX** – *Date TBD*
- **San Francisco, CA** – *Date TBD*

www.bestofimca.org

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5619 DTC Parkway Suite 500

Greenwood Village, CO 80111

P 303.850.3089 | F 303.770.1812 | www.IMCA.org

