

Student Catalog

Chartered Financial Analyst (CFA)



Program Objectives & Overview

CFA Exam Review:

Morgan has partnered with Schweser to offer an interactive and comprehensive study experience combining powerful practice tools with expert instruction for rigorous preparation.

Morgan offers the CFA exam review courses in the following study formats for both business to business and business to consumer channels:

- **Live** – (applicable in specific cities) The live classroom format offers a structured schedule and live personal interaction with instructors and peers. Students can ask questions, get study tips and instructor support, along with accessing all the study tools available in the self-study software.
- **Live Online** – Morgan's Live Online course lectures provide the same structured schedule and real-time access to instructors, but in a virtual classroom format available anywhere in the world with reliable internet access
- **Self-Study** – self-study package equips the students with the industry's best tools to prepare for the CFA exam wherever they want, on their schedule.

Morgan's CFA Exam Review courses are not required to be eligible to take the CFA exam. While students may opt to complete all available course modules, this program is designed to help students identify and focus on areas where supplemental study will increase likelihood of passing the CFA exam. Therefore, Morgan does not issue course grades, track academic progress nor award a degree or diploma at course completion.

CFA Review Course Descriptions

This course prepares students to pass level 1, 2 & 3 of the CFA exam. Topics include:

1. Ethical & Professional Standards
2. Quantitative Methods
3. Economic Analysis
4. Financial Statement Analysis
5. Corporate Finance
6. Portfolio Management
7. Market & Instruments
8. Equity Investments
9. Alternative Investments
10. Derivative Investment
11. Fixed Income Investment.

Eligibility to Sit for the CFA Exam:

The CFA exam and credentials are administered by the CFA Institute. The CFA Institute publishes its eligibility requirements to earn the CFA credential on their website. It is the CFA Exam candidate's responsibility to determine whether the CFA Institute requirements to earn a CFA credential have been met. CFA Exam review courses are not required to be eligible to sit for the exam and are solely intended to

help a student prepare for the exam through supplemental review material.

Learn more about the CFA Institute Exam eligibility requirements by visiting:

<https://www.cfainstitute.org/en/programs/cfa/exam>

Policies

PassProtection™

Please refer to Kaplan Schweser's Pass Protection for CFA Exam Prep:

<https://www.schweser.com/cfa/passprotection?srsId=AfmBOopHw1UGSBB5muC3qCL1kTHETcCdMAC7KZR8I461iJrei08XhDII>

Cancellations & Refunds:

Termination Right

You may terminate the license, enrolment, service, or subscription at any time, however, whether You receive a refund is based on Morgan's Refund Policy set forth below.

Refund Policy

Requests for a refund must be made in writing within Thirty (30) days from Your date of purchase explaining the reasons for cancellation and before activation of the access. No refunds will be accepted after attending the first lecture or activation of the access. Morgan will issue the refund, minus any non-refundable fees within thirty days from request (or from date of printed materials return, if applicable). Refund will be issued, after deducting any non-refundable fees or CPE completed course fees outlined below, within thirty days from request. Refunds are only issued for the full bundle purchased and are not subject to partial refunds based on lack of utilization of bundle features, such as Live or Live Online instruction or tutoring. For CPE Subscription/Certificates refunds will be pro-rated based upon the number of completed courses or webcasts. Each completed course or webcast will be assessed at the existing "per course" rate and deducted from the refund amount. All terminations and requests for refunds must be made in writing to the local office. Business hours and contact information are available on our Contact Us page.

Refunds for Programs Which Include Printed Materials

Upon notice of cancellation, if the program included printed materials (i.e., textbooks and/or flashcards, etc.), You must return all printed materials within ten (10) business days from the date of cancellation to receive the refund. Upon receipt of such printed materials, refund for tuition will be issued, after deducting any non-refundable fees outlined below, within thirty (30) days. The shipping costs to return printed materials is Your sole responsibility. All textbooks should be returned to the local office. For the avoidance of doubt, any content the You printed or materials the You downloaded related to any of Morgan's program may not be transferred or sold to another person.

Non-Refundable Items

All stand-alone products such as printed flashcards, content and materials, textbook, supplemental multiple choice questions, and California State University Courses (credits) are non-refundable ancillary products. Flex Pay installment fees and shipping

fees including fees for tuition waiver “Becker Promise” are non-refundable. The refund will deduct these fees at original standard standalone price “Self-study Price” excluding any discounts price or bundled price with courses. Self-study products and stand-alone ancillary products purchased are nonrefundable.

Student Feedback

Candidates may send comments or complaints regarding the course, instructors or any other feedback on customersupport@morganintl.com

Academic Policies

CFA Exam Review:

Entrance Requirements

Any student may purchase the CFA Exam Review course at any time and there are no prerequisites or entrance requirements. There are no deadlines for purchasing the course. The CFA Access is valid up until the chosen exam window. Extensions are applicable and follows the Pass protection below. Students are required to complete the Practical skills module on the CFA Account to earn the results of the CFA L1 exam.

Previous Credit

Morgan is not a degree or diploma granting institution and does not grant credit for previous education, training, or experience.

Academic Progress and Certificates of Attendance

The purpose of Morgan is to prepare students for the corresponding licensure exam. Therefore, while Morgan does provide visibility to individual course progression through the course software, Morgan does not issue grades, track formal academic progress, nor award degrees or diplomas at course completion. Completion of the program is not required to be eligible to sit for the corresponding licensure exam. Certificates of attendance for exam review programs may be requested for individual purposes (such as employer verification).

Attendance

Viewing pre-recorded lectures in the Learning Management System or attending Live or Live Online lectures is encouraged as an essential component of preparing for the Exam, but is not required, as Morgan does not track standards of academic progress.

Publicity Waiver & Release Disclosure

By enrolling in this course, the student:

(1) grants to Morgan its parent, subsidiary and affiliated companies, agents, licensees, and designees, including their successors and assigns, the absolute, royalty free, irrevocable, worldwide, right and permission, with respect to any

testimonial(written or oral), photographs, film, video or other images, or sound recordings taken by Morgan:

- (a) To use, re-use, publish, re-publish, copy, modify, display, and create derivative works in whole or in part, individually or in conjunction with other photographs, images, recordings, or testimonials in any medium (including without limitation, in print and on the Internet) and for any purpose whatsoever, including, without limitation in advertising, marketing, publications, electronic distribution, and the Internet and for any other commercial purpose; and
- (b) To use the student's name in connection therewith if Morgan so chooses; and
- (c) To copyright the same in the name of Morgan, or any other name that Morgan may choose.

(2) waives all rights to such photographs, film, video or other images, sound recordings, or testimonial and assigns all such rights to Morgan.

If the student is under the age of 18, the parent or legal guardian's signature indicates that he/she and the student have read, understand, and agree to be bound by the terms of this disclosure.

The student understands that there will be no compensation for the permitted use of any testimonial (written or oral), photographs, film, video or other images, or sound recordings taken by Morgan or of the student's name.

The student releases and discharges Morgan, its successors, assigns and any designee (including any agency, client, broadcaster, periodical, or other publication) from all claims and demands arising out of or in connection with the use of such photographs, film, video or other images, sound recordings, or testimonial, including but not limited to any claims for defamation, invasion of privacy, right of publicity, emotional distress, or any similar right. Furthermore, the student represents and warrants that any testimonial given is original and does not infringe upon copyright or proprietary rights of another person or entity.



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