



---

---

## CFAA Event Note 5/17/2012

---

---

### “Success in 2012 CFA” Pre CFA Exam Workshop

On May 17, 2012, Chinese Finance Association of America (CFAA) hosted a workshop for those who are interested in pursuing the CFA (Chartered Financial Analyst) charter and taking the respective exams. The exam dates, which are quickly approaching, for Level I, II, and III will be held on June 2-3. CFAA’s Pre-CFA workshop allowed all in attendance the opportunity to learn as well as talk with financial professionals from various fields who have been long time holders of the CFA charter.



Attendees were privileged to hear insights about the CFA charter and exams from CFAA’s President Vivian Lin and guest panelists: Dr. Wei Li, Director of Research at Thomas White Asset Management, Gary Wu, Senior Vice President at BDT Capital Partners, LLC, and David Tang, Quantitative Analyst at Neuberger Berman Fixed Income LLC.

With the exam only a few weeks away, CFAA’s Xiran Chen wonderfully moderated the workshop to pin-point the essential questions that the attendance were eager to hear. Such questions covered were, “How and when should someone study for the exam?” While the answers varied from each of the panelists, from spending more time studying the heavier weighted questions on the exams to cramming in the last week, there was a consensus on the importance of





# Chinese Finance Association of America

美国华人金融协会

continually practicing the old exams as well as taking the extra one or two weeks off from work right before the exams, to study.

A key question presented to the panelists regarding whether or not they suggested pursuing the CFA charter in the same time as studying for an MBA degree or working full time. “It’s OK to wait until you are out of school because you may not really know what kind of career you truly want yet,” says Vivian Lin and seconded by the rest of the panelists. All agreeing that young people would be making a good choice by choosing to wait until they have a clear idea as to the type of career path they want to take because the CFA charter is important for select jobs, not just any type of financial careers.



This workshop was truly a must have experience for those in attendance as the knowledge shared by the panelists shed light on the worries many people have whether they are taking their first exam or finishing up on the level III exam. There were many key points stressed throughout this discussion that helped put the attendees at ease:



- Taking the exam, it is important to know the topic of the question being asked, get to the point, and move on.
- If you are having trouble answering a question, “Go with the weight of the test,” and stick with the important stuff.
- During the written portion make sure to write down key sentences and not just words, as the test graders are looking for full thoughts and not just key terms.
- And most importantly do what it



# Chinese Finance Association of America

美国华人金融协会

Overall, the workshop was very informative and knowledgeable for all. As another successful CFAA event has ended, we are all looking forward for more to come. We at CFAA wish everyone in attendance to this work shop, as well as everybody who will be taking the CFA exam, the best of luck!

-----

## **About CFAA**

Chinese Finance Association of America (CFAA) is an independent not-for-profit, non-partisan organization committed to promoting educational and cultural exchange among finance professionals between the United States and Greater China through facilitating communication and the exchange of ideas in the financial industry. Incorporated and headquartered in Chicago, Illinois, CFAA is aimed to serve Chinese finance professionals and others who are interested in the financial industry of Greater China. Please visit our website [www.ChineseFinanceAssociation.org](http://www.ChineseFinanceAssociation.org) for more information about CFAA. To become a CFAA member, or to renew your CFAA membership and make your membership payment, please go to the [membership section](#) on our website. If you are interested in the volunteering opportunities at CFAA, please submit the [volunteer and staff application form](#). For global career opportunities in finance, please visit our newly launched [Online Job Center](#) through our partnership with one of the leading global career placement companies eFinancialCareers.com.