



ACADEMY of CERTIFIED PORTFOLIO MANAGERS

Providing a credential program of excellence for portfolio managers.

WHAT IS THE CERTIFIED PORTFOLIO MANAGER DESIGNATION?

The Certified Portfolio Manager (CPM®) designation is a collaboration of the Academy of Certified Portfolio Managers (ACPM) and Columbia University. The academic component is designed for financial services industry professionals in order to provide a deeper understanding of fundamental security analysis, asset allocation, and portfolio management concepts.



THE CURRICULUM WILL ENCOMPASS EIGHT CORE CONCEPTS:

- Fiduciary Responsibility
- Quantitative Methods
- Financial Statement Analysis
- Fixed Income Analysis
- Equity Analysis
- Corporate Finance
- Derivatives
- Portfolio Management



CPM® AND COLUMBIA UNIVERSITY

Participants will complete an online curriculum created by ACPM. Upon completion of the online material, qualifying candidates will be invited to participate in a multi-part agenda at Columbia University where they will be taught advanced concepts by internationally recognized professors. Additionally, candidates will discuss cutting edge issues in finance and investing with professors, industry professionals, and colleagues in an intimate, interactive setting.





HOW TO EARN THE CPM®

1. Review candidate eligibility online at www.academyofcpm.org
2. Complete program application & register
3. Complete an online self-study course (150-200 hours)
4. Attend a five-day residential program at Columbia University in New York City
5. Pass the final exam

BENEFITS

Based on ACPM survey data, 72% of CPM® professionals have grown their business over 20% since earning the mark

Awareness of regulatory standards and training to enhance competency

Affiliation with an exclusive group of professionals

Higher level of training and technical skills to manage portfolios

Greater satisfaction and recognition

“The questions I heard asked by my peers during our rigorous courses at Columbia showed me how passionate and thoughtful they were.”

- Michael Khaw CPM®

“I sharpened my portfolio management skills and feel empowered by the entire experience.”

- Dennis Verity, CPM®

“CPM undoubtedly raised the bar on the skill set I draw on to serve clients. Though challenging, it was an invaluable exercise to expand and deepen my knowledge, enhancing my ability to deliver investment excellence.”

- Kevin T. Anderson, CPM®



Academy of Certified Portfolio Managers
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