

CERTIFICATE IN FINANCE & TECHNOLOGY



EMPOWERING TECHNOLOGISTS
in finance

{CFT}:

INTRODUCTION

Empowering technologists in finance

In the world of banking and finance never has there been more pressure on technology professionals to fully understand the business they support. Technologists face two major challenges: keeping up with rapid developments in technology and understanding the complexities of the financial markets. That's where the Certificate in Finance and Technology (CFT) comes in.

The CFT is a pioneering, benchmark qualification, designed by expert industry practitioners to give technology professionals a unique opportunity to gain an in-depth understanding of the business they support and an accelerated ability to create valuable, relevant solutions.

Benefits of the CFT

For candidates

Build a strong foundation

Learn the fundamentals of finance and technology following a unique syllabus that enables you to thoroughly understand the banking process, how technology interacts, the deeper company perspective, the wider industry movements and your role within these.

Become an expert

Gain invaluable experience and real-life industry insight to help you innovate and meet your technology targets more accurately and efficiently. The CFT helps you make confident and intelligent decisions.

Show firms you mean business

Demonstrate your passion to excel. Your commitment of time and effort to attain the CFT will bring you credibility and acknowledgement that you're serious about your role.

Fast track your career

Accelerate your opportunities for more responsibility and leadership with the outstanding package of knowledge, skills, expertise and confidence gained from the CFT.

For employers

Attract top quality staff

By offering training for the CFT as part of their remuneration you will attract a higher calibre of candidate for new roles and show your dedication to investing in your staff.

Increased retention

Offering the CFT to employees improves their commitment to the firm both during their studies (which take from 18-36 months) and afterwards.

Higher skilled employees

Perhaps the most important benefit of having CFT qualified staff is they will perform better. They will understand the business better and how their role fits into the bigger picture. They are much more likely to offer opinions as they have a greater comprehension of the products and services you offer. They will work faster and more effectively.

Assess new applicants

It is increasingly difficult to evaluate job candidates. Those holding the CFT qualification demonstrate a broad understanding of the industry and the technology skills required to support it.

For more information, give us a call: EMEA: +44(0)207 183 7318 Americas and rest of the world: + 1 646 233 1085 or go to www.certfintech.org



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{ AN OVERVIEW }

We offer you unparalleled training in one of the most exciting and dynamic industries in the world.

To become a successful innovator in our age of 'big data', requires a very specific set of skills and knowledge. These are essential in a world where competition is fierce. Securing a technology job or moving up the ranks in an existing role is becoming an increasing challenge.

The CFT addresses this problem head on with an outstanding programme structure and content that prepares graduates and professionals to become future leaders.

Our subject coverage

- Technology topics including software engineering, project management, data science, payments technology and cryptocurrency
- Finance topics including debt, equity, derivatives and asset management

The CFT provides a forum for you to ask questions and gain invaluable opinions and expertise. As a professional body, our expert instructors work to influence the design and development of the latest technology platforms within financial services. Their collective experience spans decades and our instructors either currently work in global investment banks and technology firms or have amassed years of experience working with these organisations.

ACCREDITATION AND AFFILIATION



CFA accredited

The CFT is an Approved Provider of continuing education programs for CFA Institute members. As a participant in the CFA Institute Approved-Provider Program, The Certificate in Finance and Technology program qualifies for 25 credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE tracking tool.

www.cfainstitute.org



CPD accredited

The CFT is accredited by the CPD standards office. CPD Accreditation enables us to benchmark our training to ensure we remain one step ahead. Accreditation ensures that the professional standard of our qualifications are maintained. Taking the CFT, a CPD accredited program, is beneficial for career progression and enhancement.

www.cpdstandards.com



ProctorU

ProctorU invigilates students taking the exams online using webcams and screen-sharing technology. The service gives candidates the convenience of taking the exam anywhere in the world and the CFT the ability to ensure academic integrity. ProctorU uses a patent-pending three-step process that confirms the candidate who registered for the exam is the candidate who is taking the exam and is following the CFT's rigorous exam requirements. www.proctoru.com



ROI Training

ROI delivers customized technology and management training solutions to large corporations and government agencies around the world. ROI provides business professionals with the skills and knowledge necessary to increase work performance and drive greater return on investment for their global customers.

www.roitraining.com

WILEY

Wiley

Wiley's Professional Development products and services include print and digital books, subscription content, e-Learning test prep, webinars and online courseware. Wiley serves professionals in specialized markets and consumers in selected categories, a strategy that permits product franchising and deep market penetration in such areas as business, finance, accounting, workplace learning, management, leadership and technology. www.wiley.com

{ THE CFT QUALIFICATION }

The CFT is divided into three Levels. You are required to study and pass each level in succession in order to gain your certification.

Each level comprises six modules that cover finance and technology topics. The course is delivered online via our learning portal where you have unrestricted access to:

- On demand video lectures
- Live webinar lectures
- 400+ question bank: a comprehensive collection of questions that reinforce your learning, track your progress and prepare you for the examination
- Worked Excel examples for you to download
- An online helpdesk
- eBooks for each subject covered

At the end of each level, you will be required to take a two-part examination; one in finance and the other in technology. In order to give you a thorough preparation, each module contains multiple choice questions and exercises to help you practice along the way.

You take the exam anywhere in the world using our remote invigilation technology. All you need is internet access, a webcam, and somewhere private to take the exam.



{ LEARNING JOURNEY }

1 Enroll

Choose your level (you must take the three levels in order)

www.certfintech.org



2 Choose an exam date

Two sittings per year: A choice of March or September

Register for the exam up to 12 months in advance



3 Study online

Each level takes between 2 and 12 months to study, depending on your available time and current level of knowledge

Our online learning platform is hosted in the cloud and offers a suite of learning tools



4 Take the examination

Take the exam online anywhere in the world where you have an internet connection and a webcam using our remote proctoring/invigilation technology.



5 Results provided 30 days after the examination

If you pass, congratulations, you can apply to go onto the next level



{ CFT - 3 LEVEL STRUCTURE }

Level 1

- Introduction to financial services
- Debt
- Equity
- Project management
- Business analysis
- Software engineering

Level 2

- Derivatives
- Foreign exchange
- Alternative investments
- Payments and cryptocurrency
- System architecture
- UX design

Level 3

- Asset management
- Risk and capital
- Data science
- Enterprise security
- Cloud computing
- Programming languages

The CFT's syllabus is constantly evolving to encompass the latest developments in the FinTech space. As such the above structure is subject to improvements and modifications

LEVEL 1 IN DEPTH

MODULE 1 THE FINANCIAL SERVICES INDUSTRY

A focused overview of the financial markets.

Modules covers:

- The main players and the key regulators in the global financial markets
- The roles that banks and financial institutions take in the markets
- Microeconomics and macroeconomics
- The main central banks and the role they play in the financial markets
- Financial mathematics
- The life cycle of a trade

MODULE 2 DEBT

A comprehensive overview of debt and fixed-income products traded and invested in by investment banks, asset managers and other institutional investors. Module covers:

- Debt market overview
- The main debt market participants
- The definition, methodology, uses and limitations of money market rates
- Money market products
- Repos
- Fundamental features of bonds
- The main credit rating agencies
- Bond pricing and yields
- Bond issuance (DCM)
- Bond trading
- Securitization



MODULE 3 EQUITY

From the fundamental features of equity through insurance, valuation and trading. This comprehensive module ensures delegates are fully conversant with one of the most fundamental of asset classes. Module covers:

- The fundamental features of equity
- Key participants in the equity markets
- Equity valuation
- Equity issuance
- Equity markets and trading
- Equity indices

MODULE 4 PROJECT MANAGEMENT

Project management is a core skill required for any professional working within infrastructure in finance. Being proficient in managing multiple projects, work-streams and people doesn't just need a theoretical understanding of the principles, but a focus on all the practical elements involved. Module covers:

- Project fundamentals
- Project goals and objectives
- Project planning
- Scope
- Stakeholder management
- Team management
- Managing the plan during execution, control, and monitor phases
- Closing the project



MODULE 5

BUSINESS ANALYSIS

Technologists must understand the needs of their internal clients in order to build systems that expertly meet business objectives. Module covers:

- The role of a business analyst and their work process in financial organizations
- The key skills and competencies required of a business analyst
- Software development methodologies
- Solution requirements
- Needs analysis
- Scope of effort
- Techniques to analyse the business need and case
- Stakeholder management
- Elicitation
- Effective communication
- Verification and validation



MODULE 6

SOFTWARE ENGINEERING

This module will focus on the changing role of software engineering in financial services and examine the adaptations stemming from industry moves such as outsourcing and regulatory changes.

Module covers:

- Introduction to software engineering in financial services
- Software development lifecycles
- Problem solving and algorithms
- Key data structures
- Programming languages
- Key properties of object orientation
- Interpreting a UML class diagram
- Data processing and storage
- Quality assurance

THE CFT MANAGEMENT TEAM



Sanjay Bhandari, CEO

Sanjay is a globally recognised leader in the technology space of financial companies. He runs training in finance and technology for the world's leading organizations such as Credit Suisse, Nomura, RBS, Barclays and JP Morgan. Sanjay was head of technology at Fitch Learning where he helped develop finance and technology programmes for the worlds' global investment banks. Before this, Sanjay was head of the eTrading platform at Bank of America and worked at Merrill Lynch London where he built and maintained trading and risk platforms for the rates desk.

Rob Woods, CFO

Rob is an accomplished financial trainer with 20 years of experience designing and delivering training programmes to firms across investment banking, sales and trading, wealth management and asset management; these include Credit Suisse, Barclays, Nomura, JP Morgan Asset Management and Terra Firma. Rob majored in computer science and qualified as an accountant and brings a unique combination of knowledge and experience that enables him to create tailored, focused course content and examinations that address the needs of technology staff within financial services companies. He is very excited to be part of the CFT senior management team, enabling the delivery this long overdue qualification.



Paul Fegan, Commercial Director

After an early career in Banking working for Lloyds, Bank of Scotland and BZW Paul moved to BPP to deliver training courses for the Finance Division. Here he structured bespoke programmes for investment banks on swaps and derivatives as well as delivering public courses for the CISI qualifications. In 1998 he co-founded Absolutely Training, and as CEO led it to become the largest supplier of regulation and compliance training in the UK. He partnered with the BBA to become the market leader in anti-money laundering training. Having taken senior positions at Unicorn Training, Incisive Media and ILX Group he is now Commercial Director of CFT.

CONTACT

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THE CORE CFT FACULTY

Dr Oliver Williams

Oliver traded fixed income derivatives at JPMorgan and Credit Suisse from 1994 to 2004, as well being active in structuring, marketing and client educational events in the same area. Since then he has worked as a consultant to banks, brokers and asset managers – as a financial trainer and also developing trading tools. Oliver designs quantitative trading strategies for clients and has developed various computer models to identify relative-value trading opportunities. Oliver has an MPhil and PhD in Financial Economics and an MA in Computer Science and Management from Cambridge University, where he also lectures in economics, statistics and trading game theory.



Mark Nolan

Mark brings more than 25 years of leadership in the banking sector. He has held senior roles in research and sales technology at JP Morgan and finance architecture at RBS. He has employed his expertise in architecture to implement innovative solutions in risk management and financial reporting. Mark prides himself on his ability to take a complex process and break it down into its core components to build exceptional, efficient and robust technology solutions. Mark shares his wealth of knowledge and insights with CFT students as our lead author and tutor of software engineering and data science.



Amber Israelsen

Amber is a Microsoft Certified Trainer and Microsoft Certified Professional Developer with 14+ years of experience working with and teaching Microsoft technologies. She also works to bridge the gap between developers, designers and businesspeople with her expertise in visual communication, user experience and business/professional skills. For her work as a training leader, Amber received Training magazine's 2013 Emerging Training Leader award.

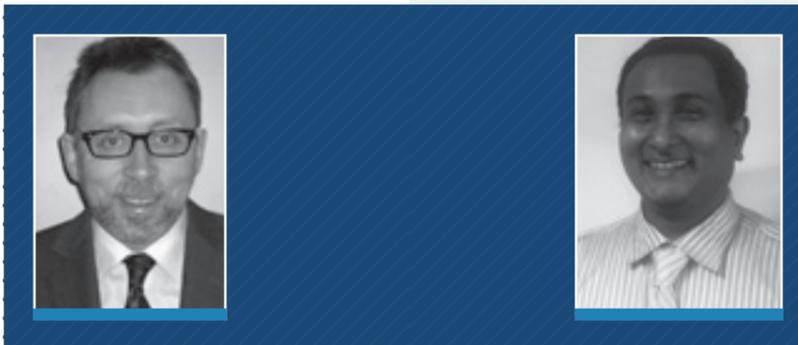
Ali Mawji

Ali has worked with global investment banks, wealth managers, fund managers and sovereign wealth funds in designing and delivering programmes for analysts, associates and more specialised courses for senior employees. Ali is a CFA charterholder and brings a wealth of experience in designing and delivering training courses on a range of professional qualifications targeted towards the banking and finance sector. He brings strong industry experience, having worked as an equity structured product derivatives salesperson at UBS Investment Bank in London. He studied Computer & Business Studies at the University of Warwick, and is looking forward to help bridge the gap between the finance and technology areas to enhance the global financial services industry.



David Oakes

David has over 20 years of experience designing and delivering training programmes on fixed income markets, derivative securities and risk management for a wide range of clients, including investment banks, derivatives exchanges, financial market regulators and technology companies. After training as an economist, he worked as a lecturer in finance at the University of Exeter and Warwick Business School before becoming Director of Academic and Professional Education at the ICMA Centre at the University of Reading. For the past decade, he has run his own training consultancy. David has a passion to share his knowledge and experience of fixed income and derivative markets with CFT candidates.



CK Bhaumik

CK has over 20 years of experience in software engineering and business analysis. He has delivered multiple cloud based Management Information Systems to businesses in various countries including the US, Canada and India. He has several years of experience training corporate employees in the field of Technology and Information security. He has a keen interest in new and effective coding methodologies and security.



Cate McCoy

Cate has undertaken roles as a Project Manager, Business Analyst, and Programmer specializing in leading Business Intelligence projects. Cate works on building learning materials for some of the leading financial firms such as Morgan Stanley, Goldman Sachs and RBS. She has steered technology projects through the complete software development life cycle with large private industry clients, non-profit clients, and government clients. Cate's unique niche is in bridging the gap between business people and technical people to achieve client goals.

Milko Filipov

Milko is a payments expert in the areas of payment systems, card payments, e-banking and has a strong interest in innovative payment solutions and technology. Milko brings broad industry experience, having undertaken roles as Business Analyst, Business Architect and Consultant in global payments projects. Milko holds an MBA with focus on finance and strategic management from the Katz Graduate School of Business at the University of Pittsburgh. He enjoys helping technologists working for financial institutions better understand the success factors in the industry in order to provide a better banking environment.





{ TESTIMONIALS }



We chose CFT training because of its unique offering to combine technology and business product knowledge. The course content, training quality and the delivery method were key elements during our selection process.

*Head of EMEA Finance & Risk Technology,
US Investment Bank*



The CFT has provided an excellent option for higher education by combining the most relevant aspects of the business. The CFT's financial and technological applications to the industry are unparalleled. The structure of the exam allows for complete flexibility in my studies. I would recommend this exam to anyone who is looking to deepen their knowledge of finance and technology.

Product Manager, Large Financial Services Company



GET IN TOUCH

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