

# THE CI<sup>®</sup> CHARTER

Demonstrate your mastery of the financial modeling and valuation skills most needed for a competitive career in investment banking and private equity.

The Chartered Investor<sup>®</sup> (CI) credential is the professional standard of choice for more than 5,000 investment banks and private equity groups worldwide. When hiring, leading firms demand professionals with real-world financial modeling & valuation skills, technical competence, and the highest professional standards, often requiring the CI credential for consideration.



---

## CHARTERED INVESTOR (CI) PROGRAM

The Chartered Investor designation is the official designation for analysts and associates in investment banking and private equity. The CI Institute tests candidates on financial modeling and valuation at three levels and provides the designation after all levels are passed and a certain amount of experience is gained in investment banking or private equity.

Enroll in the CI Program to begin earning the Chartered Investor (CI) credential, the most respected and recognized investment banking and private equity designation in the world. The CI Program provides a strong foundation of advanced financial modeling and valuation skills that will give you a career advantage.

The CI Program curriculum covers concepts and skills you will use at all stages of your career. The self-paced, online format makes it easier for you to continue working while you complete the program. Completing the CI Program shows employers and clients you have mastered a broad range of practical investment banking and private equity skills.

---

## WHAT YOU WILL LEARN

The CI Program is offered in a self-study format and is divided into three levels of exams.

### LEVEL I

Comp Company Modeling

Comp Transaction Modeling

DCF Modeling

Financial Statement Modeling

### LEVEL II

LBO Modeling

Merger Modeling

### LEVEL III

Advanced LBO Modeling

Advanced Merger Modeling

---

## INVESTMENT BANKING & PRIVATE EQUITY

Breaking into investment banking as an analyst or associate at a bulge bracket investment bank is a difficult task. The Chartered Investor designation makes this process easier by demonstrating to an employer, mastery of financial modeling & valuation at each level of the Chartered Investor Program.

It can take years for an analyst or an associate to enter the world of private equity. By becoming a Chartered Investor, one can accelerate this process and join the buy-side.

---

## HOW TO EARN THE CHARTER

1. Become a CI candidate and enroll in the CI Program. To do so, you must
  - meet one of the following criteria:
    - Have a bachelor's (or equivalent) degree,
    - Be in the final year of a bachelor's degree program,
    - Have four years of professional work experience, or
    - Have a combination of professional work and university experience that totals at least four years.
  - be prepared to take the exams in English.
  - have a valid international passport.
  - meet the professional conduct admission criteria.
2. Pass the Level I Exam (June or December).
3. Pass the Level II Exam (June).
4. Pass the Level III Exam (June).
5. Have four years of professional work experience in the investment decision-making process (accrued before, during, or after participation in the CI Program).
6. Join CI Institute as a regular member.