



Exam Learning Framework Tactics

Developing Competencies



Dear CFA Candidate,

Here you will **find the set of tactics** to help you improve those areas of your exam prep that could use some boost.

We've prepared some **PLANNING, STUDY, REVIEW, and SELF-ASSESSMENT TACTICS** for you.

Now, you need to **analyze them in the context of your CFA exam prep** to be able to decide on the best tactics for you.

Keep your head open and don't be afraid to face the truth about how you're really doing.

Even if the truth is cold & hard...

Only a thorough introspection to your CFA exam prep can help!

Good luck to you!



YOUR CFA EXAM PREP:





PLANNING TACTICS

NAME	GOAL	DEVELOPED COMPETENCIES
Everyday Tasks Prioritized	to find time to study	organization flexibility self-awareness
Daily Study Sessions & Weekend Study Sessions	to arrange study time	organization flexibility self-awareness
Stay Calm, Stay Focused	find the right place to study (library, quiet room) + mute your phone 😊	ability to focus
Days Off Studying	to rest & stop the burnout	ability to rest
Final Review Planned	to revise before your exam (some days off work?)	organization flexibility self-awareness



ABILITY TO PLAN

COMPETENCIES TO DEVELOP

Your ability to plan is no plain skill. In fact, it's a cluster of skills. You need to be able to organize your study time, but also to be flexible because as time passes – things change. You need to be able to react to these changes. However, keep your self-awareness constantly switched on. Flexible cannot mean lenient or inefficient! You plan to carry out your tasks. That's why you need to arrange for an appropriate study environment and make sure you have enough energy to study and learn.

GOALS TO REACH

The main goals behind your PLANNING TACTICS should be to:

- find time to study (by developing your ABILITY TO PRIORITIZE)
- arrange your study time from week to week
- find the right environment to study
- find balance: study time – leisure time
- plan enough time for final revision before your exam



STUDY TACTICS

NAME	GOAL	DEVELOPED COMPETENCIES
Every Day Counts	for systematic learning	diligence grit & determination
PRURP cycle: Preview>>Read>>Understand >>Review>>Practice	to handle CFA Curriculum readings	understanding CFA Curriculum & developing hard skills, e.g. math & analytical skills, ability to associate facts, test-solving skills, etc.
Pomodoro Technique	for spaced & focused study sessions	ability to focus on a given task
Always Use Calculator Not Excel	to get friendly with your calculator, even if it's initially hard	calculator skills
Flash Cards For Formulas	to learn & review	knowing how to use formulas
Make: Cheat-Sheet Notes	to put down things you MUST know	understanding CFA Curriculum (esp. ability to associate facts), productive learning



ABILITY TO ACT AS PLANNED

COMPETENCIES TO DEVELOP

To act as planned you definitely need a lot of grit & determination. Moreover, if you are diligent and practice your grit every day – acting as planned will become a habit. And this is your top competency to develop here. Because with systematic study sessions arranged and then spent efficiently, you ensure you also develop all the hard competencies required by the CFA Curriculum. One of the best ways to make your study time productive is making notes. This traditional method of gaining knowledge challenges your mind all throughout your study time and comes in handy during your revision sessions (see REVIEW TACTICS below).

GOALS TO REACH

The main goals behind your STUDY TACTICS should be to:

- study systematically
- handle (the majority of) CFA Curriculum readings
- get to know your calculator
- master formulas
- study to learn (which brings us to your ABILITY TO FOCUS)



REVIEW TACTICS

NAME	GOAL	DEVELOPED COMPETENCIES
Spaced Review Sessions:	to resist your forgetting curve & enhance your learning curve	ability to focus on what's important
<ul style="list-style-type: none"> • Daily Notes Review • Daily Formulas Review • Weekly Review Sessions • Topic Review Sessions • Final Review 	<p>> even 10 minutes will do</p> <p>> even 10 minutes will do</p> <p>> every weekend</p> <p>> when you finish topics</p> <p>> before the exam (to make sure you're ready!)</p>	<p>productive learning</p> <p>understanding CFA Curriculum (esp. ability to associate facts)</p> <p>knowing how to use formulas</p> <p>calculator skills</p> <p><u>BUT ALSO</u></p> <p>diligence</p> <p>grit & determination</p> <p>self-awareness</p> <p>good judgment</p>
Open-Ended Review Sessions	to challenge your memory	good long-term memory
Self-Testing on Spaced Review Sessions	to get familiar with the exam format	<p>test-solving skills</p> <p>knowledge about the exam format</p>
Practice, Practice, Practice	to enhance your learning curve	<p>good long-term memory</p> <p>test-solving skills</p> <p>knowledge about the exam format</p>



ABILITY TO FOCUS

COMPETENCIES TO DEVELOP

Why are REVIEW TACTICS so important? Because they help you enhance your productivity by focusing on the most important aspects of each reading. Plus, they help you **overcome the forgetting curve**, which is the worst enemy of all CFA candidates.

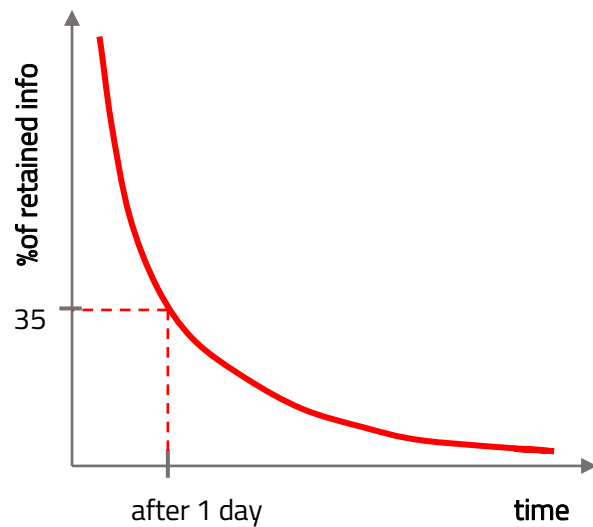
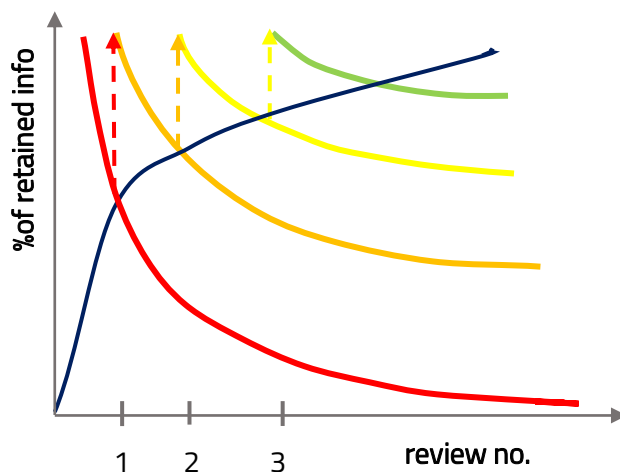


Fig.1. FORGETTING CURVE

The retention of information decreases with time.

Fig.2. LEARNING CURVE

The retention of information increases with revision.



To **enhance your learning curve**, you certainly need to practice a lot (nice side effect: you learn the exam format). You may also use your notes or ask yourself open-ended questions to challenge your memory. Review formulas, use end-of-reading questions in your CFA Curriculum. Do all this regularly to make sure you remember what you studied. It takes lots of diligence & determination but in return you gain your self-awareness & good judgment.

GOALS TO REACH

The main goals behind your REVIEW TACTICS should be to:

- resist your forgetting curve
- enhance your learning curve (by challenging your memory)
- practice as much as possible & get familiar with the exam format (rehearse!)



SELF-ASSESSMENT TACTICS

NAME	GOAL	DEVELOPED COMPETENCIES
Set Deadline Reminders	to monitor your progress & keep up your motivation	organization ability to recognize success and stigmatize failure
Make Checklists	to keep yourself accountable	good judgment self-awareness ability to recognize success and stigmatize failure
Give Yourself Grades	on a defined scale to see if you're UP or DOWN	good judgment self-awareness ability to recognize success and stigmatize failure
Fix Self-Assessment Days	at equal intervals for consistent evaluation	good judgment self-awareness ability to recognize success and stigmatize failure ability to move from failure to success



ABILITY TO PRIORITIZE

COMPETENCIES TO DEVELOP

The core of your ability to prioritize is all about success and failure. Whatever tactics you decide to apply here, they should make you concentrate on one thing – you moving forward! You want to learn to recognize your little successes and stigmatize your little failures. All this to be able to constantly move from failure to success so as to finally reach your MAIN GOAL: PASS YOUR CFA EXAM! To do that you definitely need some good judgment and self-awareness because they give you the power to improve.

GOALS TO REACH

The main goals behind your SELF-ASSESSMENT TACTICS should be to:

- keep yourself accountable
- monitor your progress
- keep up your motivation
- go back on the right track if you get lost
- re-prioritize if you're not making headway



We hope you've found some useful tactical ideas here.

You should **choose the tactics that work fine for you**. To see if they really work, you'll need to cross-check the tactics you're using against the competencies you want to develop. If a tactic is working, you will be able to see an **improvement in your skills, both hard and soft**.

Happy to guide you through your CFA exam prep 😊.

SOLEADEA TEAM