



## ABOUT THE FMI

Excellence in financial modeling and globally recognized certifications

### OUR MISSION

To advance the financial modeling profession by delivering and administering three levels of financial modelling certifications and supporting high quality education and training for financial professionals

### OUR VISION

To be thought leaders in the financial community and stewards of best practices globally

### OUR VALUES

Integrity, leadership, collaboration and innovation

## CANDIDATES

ACCOUNTING      INSURANCE      BUDGETING & FORECASTING      FINANCE & TREASURY  
RISK MANAGEMENT      ACTUARIAL      INVESTMENT BANKING      M&A      OPERATIONS  
VENTURE CAPITAL & PRIVATE EQUITY      ASSET MANAGEMENT      EQUITIES & RESEARCH      CREDIT

## CERTIFICATIONS



### LEVEL 1 ADVANCED FINANCIAL MODELER (AFM)

Focuses on the fundamental skills required to design and build a fully-integrated financial forecast model of a company



### LEVEL 2 CHARTERED FINANCIAL MODELER (CFM)

Explores a deep and broad knowledge of advanced corporate finance (project economics, valuation), financial modeling (capital structure, M&A, LBO) and data manipulation topics



### LEVEL 3 MASTER FINANCIAL MODELER (MFM)

Tests mastery of 8 advanced topics and specializations including: real estate, resources, digital and technology, supply chain, private equity, healthcare, industrial markets and more



3 LEVELS



4-HOUR EXAMS



NO WORK EXPERIENCE  
REQUIREMENTS



TESTING IN APRIL AND  
OCTOBER EACH YEAR



AVERAGE 25-100 HOURS  
SELF-STUDY PER LEVEL



SUCCESSFUL CANDIDATES AT  
EACH LEVEL JOIN FMI

[fminstitute.com](http://fminstitute.com)



## PRIVATE EXAMS: CORPORATIONS

### TEST FINANCIAL MODELING CAPABILITIES AT YOUR FIRM, ON YOUR TIME

The Financial Modeling Institute (FMI) provides corporations with the option of **Private Exams**, a flexible, convenient option to administer Level 1, Level 2, or Level 3 exams at their offices. We customize the exam sitting to accommodate your staff and timing requirements; the company provides resources to run the exams (facilities, computers, etc.). The FMI will also send a representative to your company to offer a pre-exam info session to discuss the certifications and answer questions.

### BENEFITS FOR EMPLOYERS

- **Risk Mitigation:** Reduce operational and financial risk by hiring professionals who have demonstrated their ability in financial modeling to the highest standard
- **Talent Development:** Use the FMI curriculum as a validated road map to guide the training and development of your staff in financial modeling
- **Leadership:** Be a diversity and thought leader by connecting to the FMI global network of financial modeling professionals
- **Flexibility:** Administer the FMI certifications at your office without incurring travel expenditures

### TESTING REQUIREMENTS

A Private Exam sitting brings the FMI to your office without sacrificing the exam day experience or rigorous exam standards. To administer a Private Exam, the corporation must:

- Enroll a minimum of 20 employees
- Provide 21 days notice to the FMI of the intention to host a private exam
- Ensure the testing environment can be replicated (i.e. have correct computer and desk setup)

### COST

- Pricing is dependent on the corporation providing computers and/or venue
- Please contact [info@fminstitute.com](mailto:info@fminstitute.com) for a quote



» At PwC Japan we have sponsored most of our modeling team of 30 people to take the FMI exam in a private setting. Whilst of course the private exam was moderated by an invigilator, we found that our team members were more comfortable using their own PC (due to familiarity with keyboard shortcuts, Excel settings etc.) and being in a familiar environment (i.e. our office). We believe these factors led to stronger exam performance. In general, we have seen a high correlation between the skills and experience of our team members and their success on the FMI exams. We plan to continue to use the FMI exams to encourage our team further develop their modeling skills.

Oliver Senter, PwC

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LEVEL 2  
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