

# Israel Society of Investment Professionals

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Monthly Newsletter

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SOCIETY IN FORMATION OF ISRAEL-BASED CFA® CHARTERHOLDERS

NEWSLETTER

## The first Claritas® certificate holder in Israel

### Congratulations to Yardena Alter!

The Israel Society of Investment Professionals (ISIP) is delighted to congratulate **Yardena Alter**, from **Pioneer Wealth Management** in Herzliya, on being awarded the first Claritas® Investment Certificate in Israel.



Yardena has been working for almost a decade in the financial services industry, with the past three and a half years as the Marketing Manager of Pioneer Wealth Management, an international wealth management and multi-family office.

In Yardena's words: "I decided to formalize all the knowledge I had accumulated during the years 'on the job', and even more so, find out all the missing information I didn't study on my Organizational Behavior Masters.

Since my academic studies are part of the Business Management program and due to the fact I have been working closely with financial planners, analysts, and research team members, I assumed the Claritas exam would be pretty easy to pass.

Much to my surprise I found out the learning material is very comprehensive and covers many issues in deeper depth than expected.

Naturally, I was happy to pass the test after 'cramming' for it, but I'm even more excited from the fact I can actually use the information on my day to day job.

**The Claritas program has definitely highlighted the small nuances I never noticed before, thus improving my general comprehension of the financial industry."**

### Some information about Claritas:

#### Claritas® Investment Certificate

The Claritas Investment Certificate provides candidates with a thorough understanding of how the investment industry works and their professional responsibilities within it.

The certificate is designed to reach everyone in the investment industry who helps enable investment decision making – from client services to operations, compliance and legal, from human resources to sales and marketing.

It is a self-study course which requires between 80 to 100 hours of study over a six month period and is made up of seven modules, covering the industry, tools, instruments, structure, controls, client methods, and ethics, culminating in a single self-scheduled, online exam.

For more details, please contact me or check on the CFA institute website ([cfainstitute.org](http://cfainstitute.org))

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