

# Israel Society of Investment Professionals

April 2015

Monthly Newsletter

Issue No. 6



SOCIETY IN FORMATION OF ISRAEL-BASED CFA® CHARTERHOLDERS

NEWSLETTER

## News .... Updates .... News .... Updates ...

### Franklin Templeton

Last month, Franklin Templeton hosted CFA® charterholders and candidates at an enjoyable dinner where Peter Vincent, Head of Alternatives, presented Liquid Alternatives and the case for investing in the asset class.

We hope this marks the first of many future events in which ISIP members can both network and exchange their knowledge.

### Are you a CFA Charterholder who has not yet been awarded the Israel investment license?

Following our successfully lobbying of the ISA, CFA® charterholders (who have been awarded their charter and have relevant work experience abroad within the last seven years), **only need to pass the Ethics exam in order in order to be licensed by the ISA.**

We would like to make a group application for the exemption. So, if you are a CFA® charterholder in Israel who

meets the criteria, and is interested in taking just one exam in order to be licensed by the ISA, please contact me.

### Candidates for Summer Exams

Are you sitting for one of the CFA Exams in June? Whether it is Level I, II or III, please let me know and we will put you in touch with other candidates.

We want to try and form support or study groups, to help you through the exams successfully.

ISIP is a growing group of CFA® charterholders based in Israel working to form an official CFA society.

For more information about the CFA charter and the CFA Institute, please see the website [cfainstitute.org](http://cfainstitute.org), or feel free to contact me at the email below.

For information or any questions on ISIP please email me at:

[matthew.salter@int-markets.com](mailto:matthew.salter@int-markets.com)

Professor Meir Statman is coming to speak in Israel, exclusively for the Israel Society of Investment Professionals.

Save the Date!  
Tues June 9th

### What Investors really want: Lessons from Behavioral Finance

Professor Statman is a world-renowned expert and authority on Behavioral Finance, and also an absorbing and entertaining speaker.

His speech will be based on his award winning book, *What Investors Really Want* (also in Hebrew *מה עובר למשקיעים* (בראש).

Details to follow – please email me if you want to be on a direct emailing list for event updates.