

ACADEMIC PARTNER PROGRAM

The CMT Association has been advancing the discipline of technical analysis for over fifty years. Through educational programming of the highest professional standards, the Association continues to fulfill our mission through an Academic Partner Program which promotes technical analysis education at colleges and universities worldwide.

The objective of the Academic Partner Program is to help academic institutions augment their technical analysis curriculum with the CMT Association's globally recognized body of knowledge. This is ideal for institutions that are committed to preparing students for alpha capture roles in the institutional financial markets.

The program is available to academic institutions that provide accredited graduate or undergraduate finance degrees and include courses focused on behavioral finance, quantitative methodologies, portfolio management and other aspects of technical analysis. *There are no fees associated with becoming an Academic Partner.*

The Chartered Market Technician® (CMT) credential is the preeminent, global designation for practitioners of technical analysis. The designation is awarded to those who demonstrate mastery of a core body of knowledge through application in portfolio management settings.

Joining the CMT Association Academic Partner Program indicates your institution maintains the highest standards of academic rigor and professional practice and signals a commitment to your students' career readiness and applied learning.

PLACEMENT PROSPECTS

The technical analysis skillset finds application on the alpha capture departments (front office) of any financial institution. As such it has wide acceptance across the institutional finance industry. With the emergence of quantitative finance, algorithmic trading, and behavioral finance, there is a strong demand for TA skills in these cutting-edge industries as well.

Industries

- **Investment/Fund Managers**
 - Mutual Funds
 - Pension Funds
 - Insurance Companies
 - Hedge Funds
 - Alternative Investment Funds
- **Investment Advisors**
- **Brokers**
 - Institutional
 - Retail
- **Banks**
 - FX Treasury
 - Equity Desks
 - Fixed Income Desk
- **Corporations**
 - FX Treasury
 - Commodities desk
- **Quantitative finance and algorithmic trading**

Roles

- **Portfolio Manager**
- **Research Analyst**
- **Economist / strategist**
- **Dealer/Trader**
- **System Designer**
- **System Strategist**

Top 10 global employers of CMT Members include

- **Morgan Stanley**
- **Fidelity**
- **Wells Fargo**
- **RBC (CM & DS)**
- **Bank of America**
- **Credit Suisse**
- **Charles Schwab**
- **CIBC**
- **Bloomberg LP**
- **UBS**

BASIC PROGRAM REQUIREMENTS

- **Accreditation** – The academic institution must be accredited by the regional higher education accrediting body.
- **Curriculum Continuity** – The academic institution must demonstrate interest in aligning its curriculum in whole or in part with the topics covered under the CMT Program’s Core Body of Knowledge.
- **Faculty Representative** – All correspondence, including scholarship nominations, and educational content, will be conducted through a Faculty Representative who is a full-time employee of the institution. It is preferred that the faculty/instructor is an active CMT Charter holder or aspirant.

PROGRAM SCHOLARSHIPS

Full-time students of Academic Partner institutions are eligible for scholarships, should they choose to take CMT Program Level 1 and Level 2 examinations. Our partnerships with our publisher Wiley and charting software provider Optuma enable additional pricing benefits as outlined below.

Item	Standard Fee	Fee after Scholarship
CMT Program Registration Fee	\$250	\$0
CMT December 2020	\$550	\$120
CMT Level 1 Curriculum (Wiley e-book)	\$225	\$75
CMT June 2021 Onwards	\$750	\$130
CMT Level 2 Curriculum (Wiley e-book)	\$225	\$75
Optuma Charting Platform	\$995	\$0
Optuma Online Prep Course (Level 1)	\$495	\$0
Total	\$3,490	\$400

***Please Note:** Full-time undergraduate students in their final year are eligible for the scholarship for Level 1. Full-time graduate students are eligible for scholarships for Level 1 and Level 2. The scholarship amount is liable to change at the discretion of the CMT Association. Third-party pricing as provided by Wiley and Optuma is subject to change without notice.

PROGRAM IMPLEMENTATION MODELS

The Academic Partner Program is designed to be flexible enough to adapt to the needs of the institution, subject to the availability of CMT Charterholders to support the process. To help you evaluate the various ways in which we can engage, here are some suggestions of models that are currently being implemented at institutions.

	<i>Pre-model*</i>	Model 1	Model 2	Model 3	Model 4
Working Name	<i>Introductory Workshop</i>	Faculty Led	Seminar Sandwich	Workshop based	Minor / Specialisation
Instructor	<i>CMT Charterholder</i>	Faculty in CMT Program	CMT Charterholder	CMT Charterholder	CMT Charterholder
Students	<i>All</i>	As per institute	All types	Full Time	Full Time
Duration**	<i>1 weekend This workshop introduces students to industry application of Technical Analysis and the CMT Program</i>	Subject to Availability	2 weekends @ 12-16 hours each on either side of a set self-study period	4-6 weekends @10-16 hrs per weekend	40 teaching hours and 80 self-study/practice hours for L1
			Weekend 1: concepts		60 hrs teaching and 120 hrs self-study for L2
			Weekend 2: Q&A		
CMT Curriculum	<i>No</i>	As per faculty	L1	L1 (L2 optional)	L1 & L2
Certification	<i>None</i>	None	None	Co-branded cert optional	Co-branded certificate
Additional resource	<i>None</i>	None	None	TA Optional	Teaching Assistant
Extra Testing	<i>No</i>	No	No	Optional	Available

* The pre model program mentioned above in italics can be conducted even if the institution is not currently part of the Academic Partner Program. **There is no fee to the institution for being part of the program. However, we would appreciate if the institution compensates the CMT Charterholder for their time, at the institute's standard visiting faculty hourly rate.

CO-CREATING THE PARTNERSHIP

Benefits for Partner Institutions

- Recognition on the CMT Association website which includes a logo, description and link to your website
- Name and logo placement in CMT marketing materials including the *Journal of Technical Analysis*
- License to use the CMT logos on marketing literature according to CMT Association specifications
- One complimentary copy of the official study text for the CMT Level I and II exam

Custom value-adds can be co-created on request.

Examples of custom value-adds in the Academic Partnership:

- Student benefits, including internships and opportunities for mentorships
- Faculty benefits, including publishing and peer review opportunities
- Event and workshop co-branding agreements; lectures at other institutions

If you are interested in becoming an Academic Partner of the CMT Association, please email Academy@cmtassociation.org for additional program rules and specifications.