CFA Institute®

Advanced Private Equity Certificate



About this certificate

The Advanced Private Equity Certificate is designed for private equity professionals seeking tools and strategies for successful investment management and partnership governance. Building on the intermediate knowledge and skills provided in the Private Equity Certificate, this advanced program focuses on refining skills in areas such as comprehensive due diligence, sophisticated deal sourcing, advanced financial modeling, debt valuation, and strategic communication.

The syllabus was developed in partnership with industry experts, ensuring the content reflects current practices and conventions in private equity. It also incorporates rigorous financial modeling assignments from Financial Edge, a highly reputed firm in the private equity sector.

Recommended background: Private equity experience

Important note

The Advanced Private Equity Certificate is not designed for those new to the industry. It assumes participants already have a solid working understanding of private equity concepts, techniques, and industry practices, upon which this advanced course will build.

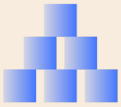
Candidates should be comfortable with core skills such as deal structuring, valuation techniques, and portfolio monitoring before enrolling, as these form the foundation for the more sophisticated challenges tackled in the Advanced Private Equity Certificate.

If you do not yet have this experience, we recommend reviewing our Private Equity Certificate first.

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Learning experience

Learners will progress through four self-paced courses, each designed to equip them with in-depth knowledge and practical skills in advanced private equity practices:



Advanced GP Toolkit Modules

- Understanding Target Companies
- Deal Sourcing, Evaluation, and Execution
- Operational and Financial Management
- Strategic Communication and Crisis Management



Advanced Private Debt Valuation Techniques Modules

- Advanced Private Debt Valuation Models
- Valuing Private Debt with Embedded Options
- Valuing Distressed Private Debt



Advanced Financial Modeling Modules

- Scenario Analysis and Updating Models for Results
- Further Applications in Financial Modeling
- Advanced LBO Modeling and Complexities



LP Perspectives Modules

- Evaluating General Partners (LP Perspective)
- Integrating ESG Considerations
- Portfolio Construction, Risk, and Liquidity Management

Who should enroll?

The certificate is ideal for experienced professionals seeking to transition to or within the private equity space, including:

- Anyone who has completed the Private Equity Certificate
- Professionals working in private equity who want to upskill to Associate
- Those working in other professional roles, such as accountants and lawyers, who want to transition to private equity
- Relationship managers, either in institutional or private wealth who want a deeper understanding of the workings of private equity



At a glance

USD 890
(USD 712 for members)

Up to **100 hours** to complete with 12-month access to downloadable course content

Online courses with live office hours support

Certificate and digital badge from globally recognized CFA Institute

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