

# CFA Guide

## for Engineers

**mentor**me  
careers



## Step 0:

# Reality Check Before Registering



Watch



Reflect



Decide

- ✓ **Watch** 10–15 hours of finance content
- ✓ Understand **markets, businesses, statements**
- ✓ Ask: “Do I enjoy thinking about money & markets?”

**YES**

Register for CFA

**NO**

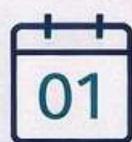
Explore before committing

## Step 1:

# Ideal CFA Timeline for Engineers

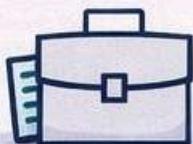


## College Students



**Start 12–15 months early**

✓ **CFA + Internships**



✓ **No rushing**



## Working Engineers



**2–2.5 hours/day**



**One level at a time**



**Avoid job switches near exam**

## College Students

## Working Engineers

✓ **Start 12–15 months early**

✓ **2–2.5 hours/day**

✓ **CFA + Internships**

✓ **One level at a time**

## Step 2:

# Subject Priority That Decides Results

### ! High Priority

- ✓ Financial Statement Analysis
- ✓ Quantitative Methods
- ✓ Ethics

### ! Medium Priority

- ✓ Economics
- ✓ Corporate Issuers

### ! Low Priority

- ✓ Derivatives
- ✓ Alternative Investments

50%+ of your CFA Level 1 result comes from **just 3** subj-.

## Step 3:

# The FBR Study Method (Engineer-Friendly)



First Read - Blue Box → EOC → Daily 5 Questions- Revision

Concept  
Clarity

Exam  
Practice

Exam  
Practice

Daily  
Retention

First Read > Blue Box > EOC > Daily 5 Questions

Concept Clarity

CFA Thinking

Exam Practice

Confidence

FBR breaks complex CFA concepts into an  
engineer-friendly loop:

Learn → Connect → Apply → Retain → Master

## Step 4: Skills Engineers Must Add

CFA Knowledge	vs.	Practical Skills
✓ Concepts		✓ Excel Fundamentals
✓ Ethics		✓ IS-BS-CF Linkage
✓ Valuation Logic		✓ Financial Modeling Basics

CFA Knowledge	vs.	Practical Skills
✓ Concept Clarity		✓ Excel Fundamentals
✓ Ethics		✓ IS-BS-CF Linkage

CFA gives knowledge. Skills make you employable.

## Step 5:

## Career Reality Check About CFA

### Expectation



### Reality



### Expectation

- ✗ Switching to finance will be easy
- ✗ High-pay front office job at the start
- ✗ CFA title = \$

### Reality

- ✗ Brutal competition, even for juniors
- ✗ Start from back/mid office roles first
- ✗ CFA = Just the entry ticket

Think long term. Fast success is a fantasy.

## Step 6:

# CFA vs MBA Finance – Decision Rule for Engineers

### CFA



### Expectation

- ✗ Skill-driven
- ✗ Hardcore Finance
- ✗ Self-paced
- ✗ Cost-effective ~1 lakh
- ✗ Best for career switch to finance

### MBA Finance



### vs.

### MBA Finance

- ✗ Brand-driven
- ✗ Management Focus
- ✗ Campus-driven
- ✗ Expensive 10-20 lakh
- ✗ Best for leadership roles

**Rule of Thumb:** CFA = Deep finance focus.  
MBA = The brand, the network.



## Expectation

vs.

## MBA Finance



### ✖ Ignoring CFA Curriculum

- Trying to just “wing it”

### ✖ Chasing Shortcuts

### ✖ Cost-effective ~1 lakh

### ✖ Best for career switch to finance



### ✖ Brand-driven

- Hunt for hacks, summaries

### ✖ Campus-driven

### ✖ Expensive 10–20 lakh

### ✖ Best for leadership roles

**Rule of Thumb: CFA = Deep finance focus.**

**MBA = The brand, the network.**

# Final Takeaway & Next Steps



Engineers, you're now armed with a clear plan for CFA success. Proceed with confidence, avoid pitfalls, and remember: mastering finance is a gradual process.

Ready to further accelerate your journey?

Bonus Resources & CFA Support at:

**M** MENTOR ME CAREERS

Visit [mentormecareers.com](http://mentormecareers.com)