

# CFA Guide *for Engineers*

**mentorme**  
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

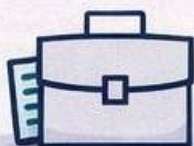


## College Students



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

✓ Start 12–15 months early

✓ CFA + Internships

## Working Engineers

✓ 2–2.5 hours/day

✓ 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

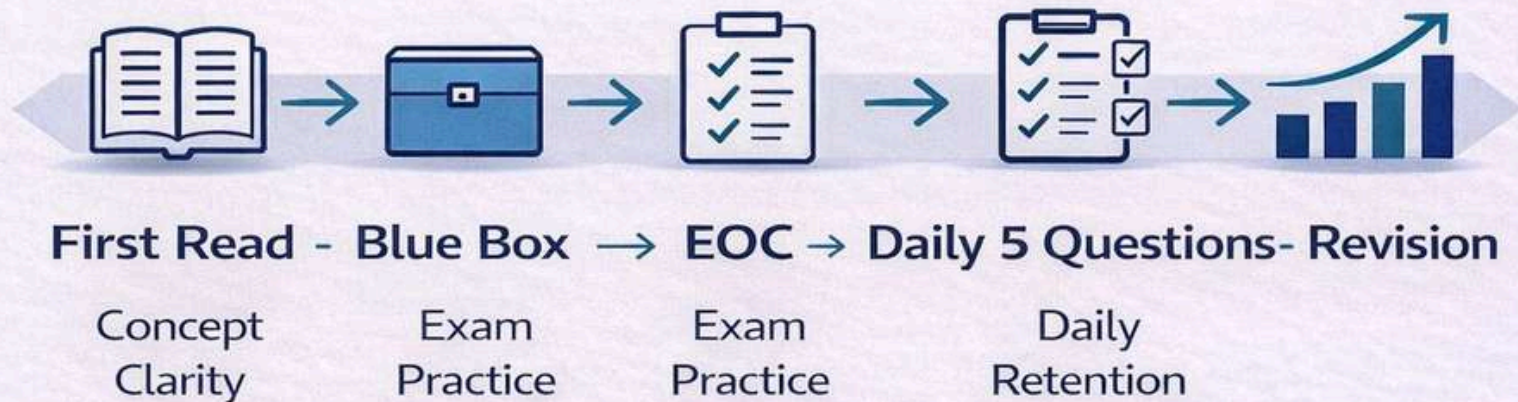
- ✓ Derivatives
- ✓ Alternative Investments

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



## Step 3:

# The FBR Study Method (Engineer-Friendly)



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



### MBA Finance



### Expectation

vs.

### MBA Finance

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



## Step 7:

# Common Mistakes Engineers Must Avoid



### 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:



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