

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 reputable firm in the private equity sector.

Prerequisite: Private Equity Certificate

Important Note

The Advanced Private Equity Certificate requires participants to have successfully completed the intermediate Private Equity Certificate.

This prerequisite ensures that all certificate registrants have a robust intermediate understanding of private equity concepts, techniques, and industry practices upon which this advanced course will build.

The Private Equity Certificate equips you with essential skills such as deal structuring, valuation techniques, portfolio monitoring, and more, preparing you for the more sophisticated challenges tackled in the Advanced Private Equity Certificate.

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:



General Partner Toolkit Modules

- Understanding Target Companies
- Deal Sourcing, Screening Techniques, and Deal 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
- Add-on Acquisitions
- Advanced LBO Modeling and Complexities
- Strategic Payouts and Incentive Planning



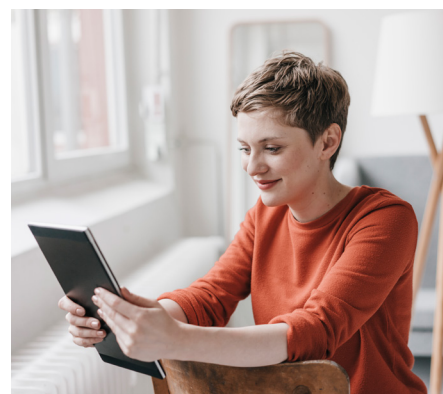
Limited Partner Perspectives Modules

- Evaluating General Partners (LP Perspective)
- Integrating Sustainability 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
- Anyone aspiring to work in the industry who can commit to professional level study
- Graduate students aspiring to enter the private equity industry



At a glance

USD 890

(USD 712 for members)

Registration opens

April 2025

Courses begin August 2025

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

Self-paced online courses with live office hours support

Certificate and digital badge from globally recognized CFA Institute

Learn more by visiting www.cfainstitute.org/programs/advanced-private-equity-certificate.