

### Q2-2023 FDP Review of Prometric Test Center & ProProctor Remote Testing

Welcome
We will start promptly at 11 AM ET

Please add your questions to the chat box, we will address them during the Q&A.

If you are unable to hear speakers just let us know in the chat box.

Following the webinar, you will receive a link to the recording. You can find a copy of all our webinar recordings at

www.caia.org/caia-infoseries www.fdpinstitute.org/webinars



# FDP FDP Review of Prometric Test Center and ProProctor Remote Testing

Q2-2023 Exam April 10 - 24, 2023



Hossein Kazemi, Ph.D., CFA Sr. Advisor FDP Institute Sr. Advisor CAIA



**Kim Durand** Project & General Operations Manager **FDP** Institute



Claire Foley Candidate Engagement & Marketing Associate **FDP Institute** 

# Agenda



### Candidate Experience

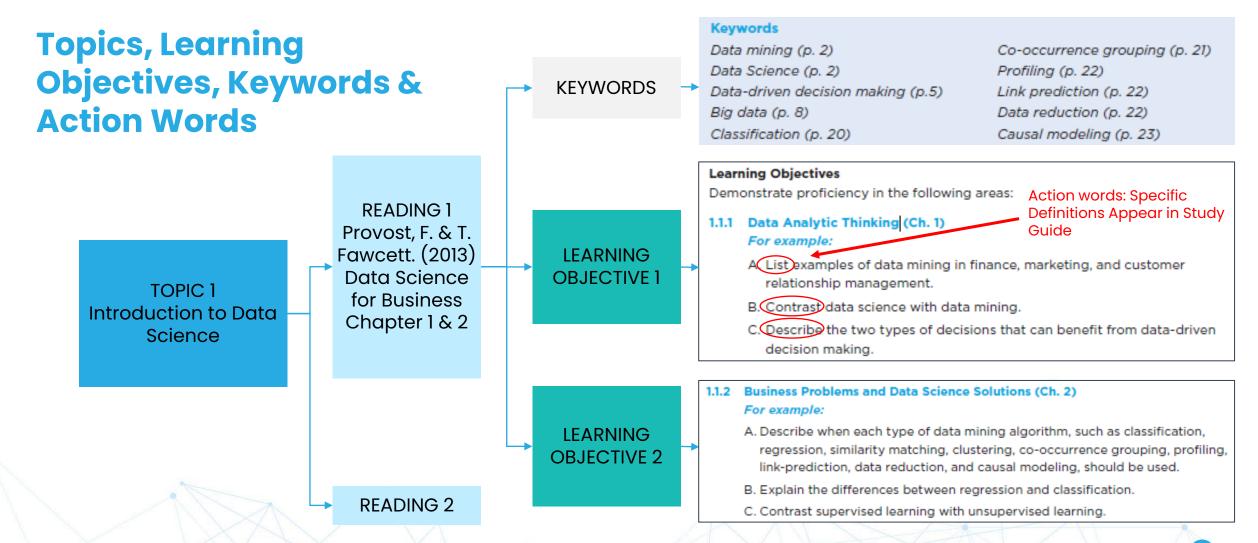
- Curriculum
- Reading Materials & Study Tools
- Prepare for Exam Day

### **Testing Options**

- Prometric Test Center
- ProProctor Remote Testing

Q&A







# **Preparation**







**FDP Handbook** Prepare for exam day







**FDP Study Guide** Prepare for the exam content

# **Study Materials**







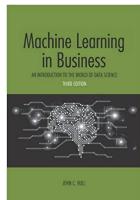
\$99 **Exam Registrants** 

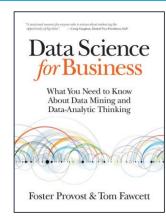


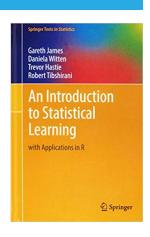
**Topics in** Financial Data Science 9 required

readings

Free **Exam Registrants** 







#### 3 required books

-Machine Learning in Business -Data Science for Business

- An Introduction to Statistical Learning\*

\*Only about 20% of this book is used in FDP curriculum

Exam Registrants can look for best available price.



# **Prep Course**



Kaplan Schweser provides an independent OnDemand review course, which is delivered 100% online.\*

With the **Review Package**, you'll get access to:

- 14+ hours of **OnDemand review** sessions led by an expert in the finance and data science industries
- Topic Quizzes to assess your knowledge as you study each topic area
- An online Mock Exam to test your mastery of the FDP curriculum

For details and registration: <a href="https://www.schweser.com/fdp">https://www.schweser.com/fdp</a>

\*Kaplan is an independent provider and not affiliated with CAIA or FDP. The FDP Study Guide is the only approved Study Guide. Prep course is not included in registration fee.



## **Exam Session**

Nondisclosure Agreement (must be completed within 5 minutes) *	5 minutes
Exam Instructions	10 minutes
FDP Multiple Choice Questions	135 minutes
Break (optional)	20 minutes
FDP Constructed Response Questions	65 minutes
End of Exam Message	2 minutes
Total Exam Session Time (approximately)	4 hours

Average Exam Pass Rate: 69.8%



# Exam Registration & Fees

**Available Discounts** 











#### Q2-2023 FDP Exam: April 10 - 24, 2023

#### Registration

Early Registration Opens	Early Registration Closes	Registration Closes	Exam Window
December 7, 2022	February 1, 2023	March 13, 2023	April 10 - 24, 2023

Testing at a Prometric Test Center: April 10-23, 2023 Remote Proctor Testing exam dates: April 23 & April 24, 2023

#### Q4-2023 FDP Exam: October 9 - 23, 2023

#### Registration

Early Registration Opens	Early Registration Closes	Registration Closes	Exam Window
June 1, 2023	July 26, 2023	September 11, 2023	October 9 - 23, 2023

Testing at a Prometric Test Center: October 9-22, 2023

Remote Proctor Testing exam dates: October 22 & October 23, 2023

#### **Exam Fees**

	Early Registration	Standard Registration	Retake
Registration Fee (refund policy)	\$950	\$1150	\$450
Enrollment Fee (non refundable)	\$400	\$400	
Total FDP Exam Fee	\$1350**	\$1550 **	\$450**

<sup>\*</sup> Exam fees do **not** include the cost of reading materials. We strongly recommend that candidates act early to obtain the readings in order to allow enough study time.

Learn more about our Association Partnerships at <a href="https://fdpinstitute.org/Association-Partners">https://fdpinstitute.org/Association-Partners</a>

<sup>\*\*</sup> Canadian taxes will be applied

# Online Course Requirements

# The FDP curriculum provides breadth and depth by requiring Candidates to complete online classes as part of the FDP Charter.

- In order to receive the FDP Charter, Candidates must successfully complete the FDP Exam and complete online classes covering the basics of **Python or R** programming. The online classes are offered by an approved provider.
- The classes can be completed before or after the FDP exam. Depending on the Candidate's background, it is estimated to take 12 hours to complete the online classes.
- No programming background is required to complete the online classes.
- There are no programming questions on the exam.

# Candidate Experience

#### Candidate Checklist

- ☑ Register for the FDP Exam
- ✓ Obtain the Curriculum
- ☑ Reserve Your Exam Seat
  - ✓ Option 1 Test Center please contact us at info@fdpinstitute.org if you do not see availability on the date needed.
  - ✓ Option 2 Online Proctoring
- ✓ Complete Online Course Requirements



# **Our Resources Your Planning**

Register Here

is Now Open!

by CAIA

**Create Profile** 

**Access your Profile** 

CHARTER CANDIDATES CHARTERHOLDERS WEBINARS HOME OUR COMMUNITY FDP CHARTER INSTITUTE®

Early Registration for Q2-2023 FDP Exam

CURRICULUM MATERIALS > PREPARATION PROVIDERS PREPARING CURRICULUM OVERVIEW RESERVE YOUR EXAM SEAT ► PRACTICE QUESTIONS AND SAMPLE EXAM ▶ ONLINE CLASSES ▶ FDP CHARTER FAO'S

COVID-19 FAQ

NEWS AND EVENTS

Q

THERE'S NEVER BEEN A MORE CRUCIAL TIME TO STAND OUT.

As the global financial industry becomes increasingly competitive, the professionals who succeed are the ones who can demonstrate their ability to add value to an organization.



#### **CHARTER CANDIDATES**

Financial Data Professionals help organizations make the most of the data they collect by finding trends, patterns and errors that might otherwise go unnoticed. Successful Financial Data Professionals have the skills to work with data, the acumen to understand the business side of the organization and the ability to communicate that information to people across their organization.

Curriculum Materials

Preparing

Practice Questions & Sample Exam Online Class Requirements

Reserve Your Exam Seat

FDP Charter FAQ's

# Prepare for FDP Exam Day

### You have options!

Be in the driver's seat of <u>your</u> exam day experience

Option 1: Test at a test center

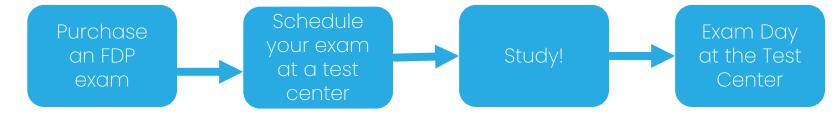
Option2: Remote Proctoring

Make the unknown ... your known!

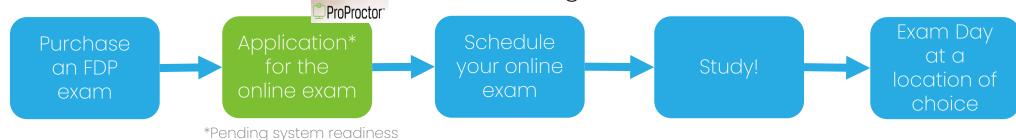


# Test Center Scheduling Your Planning

## Test Center Scheduling



Online Proctor Scheduling



## Online Proctoring:

- > A preferred testing option for some
- > A **detour** for others

Learn about Online Proctoring BEFORE you make your final decision.



# Dates to Remember

Your Planning



**Testing at a Test Center** April 10-23



Online Proctoring April 23 & 24

#### **2023 APRIL THURSDAY FRIDAY** SUNDAY MONDAY TUESDAY WEDNESDAY **SATURDAY** 11 12 14 15 PROMETRIC PROMETRIC PROMETRIC PROMETRIC PROMETRIC PROMETRIC 17 PROMETRIC PROMETRIC PROMETRIC PROMETRIC PROMETRIC PROMETRIC PROMETRIC 24 25 28 29 PROMETRIC ProProctor\* ProProctor BlankCalendarPages.com





# Option 1 At a Prometric Test Site April 10-23

- Controlled test site environment
- Onsite exam proctors monitoring
   Candidates in testing room
- Center availability
- Exam site subject to closing (outside the influence of FDP)
- Awareness of updatedPrometric COVID-19 protocols
- Schedule early in the exam window in case of any disruption



# Option 2 Remote Proctored Testing April 23 & 24

- Safe, secure, private, quiet personal location of your choosing
- Minimum Equipment and Internet requirements must be met
- Proctor monitors Candidates via webcam
- Time to prepare your test space
- Review minimum system requirements and run system test
- Schedule early in the exam window

in case of a technical issue







# Option 1 At a Prometric Test Site April 10-23

- Schedule Your Exam Seat Reservation until March 22, 2023
- If you have already scheduled your exam seat at a Prometric location and want to keep option 1 there is no action required!
- In the event that your exam is canceled by Prometric, you will be eligible for Option 2, to take the Remote Proctor Exam on April 23 or April 24.



# Option 2 Remote Proctored Testing April 23 & 24

- Applications for RPT have to be received by March 17, 2023
- Schedule Your Exam Seat Reservation until March 22, 2023
- Once you have selected the Remote Proctor Option, you <u>may not</u> reschedule an appointment at a later date at a physical location.





# ProProctor™

# Option 1 At a Prometric Test Site

### 2-part exam

- **Part 1:** 80 multiple choice questions 135 minutes
- 20-minute optional break
- **Part 2:** 2-4 constructed response questions *65 minutes*

Total 4 hours

# Option 2

## **Remote Proctored Testing**

### 2-part exam

- Part 1: 80 multiple choice questions 135 minutes
- 20-minute optional break
- Part 2: 2-4 constructed response questions 65 minutes

Total 4 hours

No unscheduled bathroom breaks

Total Exam Session Time	4 hours
Comment Period (optional)	10 minutes
FDP Constructed Response Questions	65 minutes
Break (optional)	20 minutes
FDP Multiple Choice Questions	135 minutes
Exam Instructions	5 minutes
Nondisclosure Agreement (must be completed within 5 minutes) *	5 minutes







# Option 1 At a Prometric Test Site

# Option 2 Remote Proctored Testing

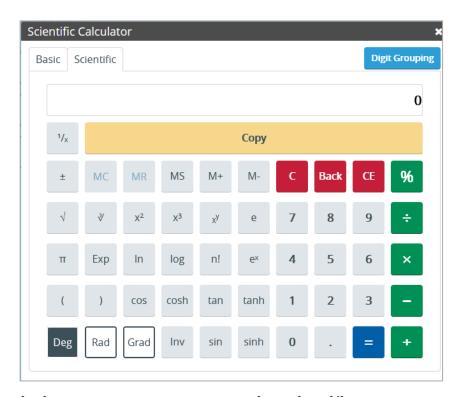
Calculator	Candidates can only use the scientific calculator that is part of the testing software	
Note Paper	Whiteboard provided by test center*	Candidate can use 4 pieces of scratch paper and 1 pencil** (Has to be ripped up while on camera!)
Unscheduled Breaks	Yes (bathroom access only)	No
What can I bring	Facemasks may be required at Prometric Test Centers* (frequently check test center protocol)	<ul> <li>1 clear glass of water only**</li> <li>2 clean tissues**</li> <li>4 pieces of scratch paper (see above)</li> <li>1 writing utensil (pencil on a rope!)</li> </ul>

<sup>\*</sup> Check the Prometric website frequently for updates.



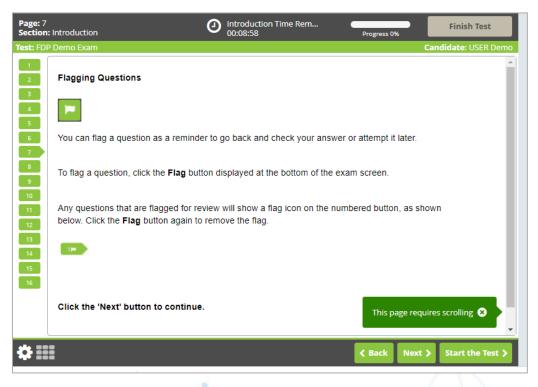
# Our Learnings

### Your Resources



#### Unlimited access to the Prometric Scientific calculator

https://training.prod.prometric.mindgrb.io/FDP-Tutorial/launch\_html\_delivery.html



#### Familiarize yourself with the Prometric platform

https://training.prod.prometric.mindgrb.io/FDP-Tutorial/launch\_html\_delivery.html



# Our Resources Your Planning

#### Reserve Your Exam Seat

Candidate Handbook | Study Guide | Registration, Exam Dates & Fees | CAIA Member Discount | Global Test Sites | Reserve Your Exam Seat

#### Registered FDP candidates have two options to take the FDP Exam:

Option 1: At a Prometric Testing Center from April 10 - 23, 2023

Option 2: Through ProProctor® (remote testing) days from April 23 & 24, 2023

Online, remote exams are offered using Prometric's ProProctor<sup>nu</sup> application. For a remotely proctored exam, you must supply the computer which must have a camera, microphone and an internet connection and be able to install a lightweight app prior to the test event. You will be able to take the exam online while a Prometric proctor is overseeing the examination process remotely.

The FDP Institute cannot guarantee availability of any test center for any given exam. A Candidate's chosen center may no longer be available when scheduling an examination appointment. Should this be the case, it is solely the Candidate's responsibility to locate, and arrange for transportation to, an alternate testing center. Deferments are not allowed and will not be granted to Candidates who are unable to sit for the exam due to failure to secure an exam appointment at either a physical or remote location.

#### Option 1:

To schedule your exam at a Prometric Testing Center

- Exam window: April 10 23, 2023\*
- Candidates can not bring their personal calculator. A calculator is provided in the software.
- Prometric Test Centers will provide scrap paper & a writing tool or a dry erase board with writing utensil.
- Seats have to be reserved by March 22, 2023.

In the event that your exam is canceled, you will be eligible for option 2, to take the Remote Proctor exam on April 23 - 24, 2023.

#### Learn more

- What to Expect on Exam Day at a Prometric Test site (video)
- Prometric Test Center Procedures (webpage)
- Prometric FAQ for testing at a test site (webpage)
- Prometric exam software tutorial (no security check required) includes the calculator.
- Video with an explanation of the calculator

#### Option 2:

To schedule your ProProctor® (remote) Exam

- ProProctor® Days: April 23 24, 2023\*
- Candidates can not bring their personal calculator. A scientific calculator is provided in the software.
- Applications for ProProctor® have to be received by March 17, 2023.
- Seats have to be reserved by March 22, 2023.

#### Learn more

- What to Expect on your Remote Exam Day (video)
- Prometric RPT physical and system requirements (user guide)
- Prometric RPT FAQ (webpage)
- Prometric exam software tutorial (no security check required) includes the calculator.
- Video with an explanation of the calculator

#### PROMETRIC

#### Communications regarding your exam appointment are shared via email.

We strongly recommend not to de-activate or delete your email in your FDP profile or the Prometric exam reservation software.

#### As you prepare to sit for the FDP exam:

Due to the changed conditions in each country and at each test location, we encourage you to regularly check this Prometric webpage (click here)

#### ProProctor DEMO

All FDP Candidate, registered for the Q2-2023 FDP exam are eligible to test the Prometric exam software, including the scientific calculator.

Learn more here

Option 1 I elect to take the FDP exam at a location near me April 10 - 23, 2023

This page is only accessible to Registered FDP Candidates Option 2 Start your Application for ProProctor® April 23 – 24, 2023

Start the ProProctor® process today!

This page is only accessible to Registered FDP Candidates



# Testing: Prometric Test Center

#### Option 1:

To schedule your exam at a Prometric Testing

- Exam window: April 10 23, 2023\*
- · Candidates can not bring their personal calculator. A calculator is provided in the software.
- · Prometric Test Centers will provide scrap paper & a writing tool or a dry erase board with writing utensil.
- Seats have to be reserved by March 22, 2023.

In the event that your exam is canceled, you will be eligible for option 2, to take the Remote Proctor exam on April 23 - 24, 2023.

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Option 1 I elect to take the FDP exam at a location near me April 10 - 23, 2023

This page is only accessible to Registered FDP Candidates



Futures Start Here.

What to expect on exam day at a Prometric test center



# Testing: Prometric Test Center

#### Option 1:

To schedule your exam at a Prometric Testing

- Exam window: April 10 23, 2023\*
- Candidates can not bring their personal calculator. A calculator is provided in the software.
- Prometric Test Centers will provide scrap paper & a writing tool or a dry erase board with writing utensil.
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In the event that your exam is canceled, you will be eligible for option 2, to take the Remote Proctor exam on April 23 - 24, 2023.

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- Prometric Test Center Procedures (webpage)
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- Video with an explanation of the calculator

I elect to take the FDP exam at a location near me April 10 - 23, 2023

This page is only accessible to Registered FDP Candidates

#### Option 1: Reserve Your Exam Seat at a Prometric Test Center

Candidate Handbook | Study Guide | Registration, Exam Dates & Fees | CAIA Member Discount | Global Test Sites | Reserve Your Exam Seat

As a candidate registered for the Q2-2023 exam you can start your Seat Reservation process here.



Learn more about Prometric's current test center policies here.

- · Please be sure to schedule your appointment at one of the secure global test locations as soon as you can because space may be limited in some locations.
- To find a test locations, see a <u>list</u> of global locations.
- Exam seats have to be reserved by March 22, 2023.





#### FINANCIAL DATA PROFESSIONAL

#### TEST CENTER EXAM

Reschedule/Cancel

Arriving at this page means you are well on your way to scheduling your Q2-2023 FDP exam.

For information on the FDP Program, go to <a href="www.FDPInstitute.org">www.FDPInstitute.org</a> \( \mathref{Z} \) . The FDP Handbook \( \mathref{Z} \) contains valuable information regarding your FDP exam. All Candidates should carefully review the Handbook during the application process and before arriving at the Test Center.

Sched	ule Appointment		
	Exam Selection		
	Eligibility Information		
	* Indicates required field  * Eligibility Number :  * First 4 characters of last name :		
		Submit	

our FDP Profile Number



## Remote Proctor Testing

#### Option 2:

To schedule your ProProctor® (remote) Exam

- ProProctor© Days: April 23 24, 2023\*
- Candidates can not bring their personal calculator. A scientific calculator is provided in the software.
- Applications for ProProctor® have to be received by March 17, 2023.
- Seats have to be reserved by March 22, 2023.

#### Learn more:

- What to Expect on your Remote Exam Day (video)
- Prometric RPT physical and system requirements (user guide)
- Prometric RPT FAQ (webpage)
- Prometric exam software tutorial (no security check required) includes the calculator.
- Video with an explanation of the calculator

Option 2
Start your Application for
ProProctor®
April 23 – 24, 2023

Start the ProProctor® process today!

This page is only accessible to Registered FDP Candidates



What to expect on your Remote Proctored exam day

Chat with technical support button



If you experience(d) an issue during your exam: **always contact the FDP**Institute at Candidate@fdpinstitute.org



### Remote Proctor Testing

#### Option 2:

To schedule your ProProctor® (remote) Exam

- ProProctor© Days: April 23 24, 2023\*
- Candidates can not bring their personal calculator. <u>A</u> scientific calculator is provided in the software.
- Applications for ProProctor® have to be received by March 17, 2023.
- · Seats have to be reserved by March 22, 2023.

#### Learn more:

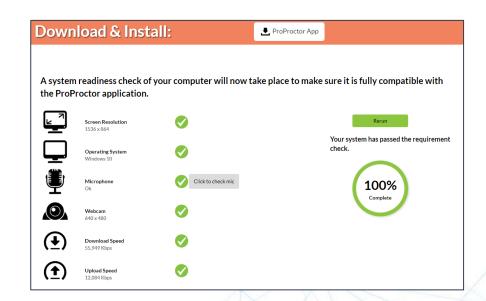
- What to Expect on your Remote Exam Day (video)
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- Prometric RPT FAQ (webpage)
- Prometric exam software tutorial (no security check required) includes the calculator.
- Video with an explanation of the calculato

Option 2
Start your Application for
ProProctor®
April 23 – 24, 2023

Start the ProProctor® process today!

This page is only accessible to Registered FDP Candidates

- ✓ Check the Prometric-ProProctor video on "What to Expect on Exam Day"
- ✓ Carefully read the Prometric remote Proctoring User Guide <u>physical and system requirements</u>.
- ✓ Complete the system ready check <u>requirements</u>.
- ✓ Check out the Candidate FAQ section.







# Remote Proctor Testing



#### FDP Institute - Application for RPT Testing Q2-2023

FDP Institute - Application for RPT Testing on April 23 or April 24, 2023

As a registered Candidate for the Q2-2023 FDP exam, the FDP Institute is offering the option to sit for your exam via a remote online proctoring service. Administered by Prometric, this option, ProProctor, allows you to take the FDP exam from your home or other secure, remote location.

>> This application form must be completed and submitted on or before March 17, 2023. <<

If you have additional questions please contact us at candidate@fdpinstitute.org

ii you nave additional questions please contact us at t	and date@rupinstitute.org
FDP Profile Number *	Exam Window *
	FDP Q2-2023 Exam V
First & Last Name *	
First	Last
Legal First & Last Name, as reflected on your government issu	ed ID
Date of Birth *	Country where you will take the RPT exam *
∺	
As reflected on government issued ID	
Phone number *	Email *
Please include country code	Provide the email address as reflected on your FDP account
Provide the phone number as reflected on your FDP account	
☐ I have completed the Prometric System Readiness https://rpcandidate.prometric.com/Home/SystemC	
Screenshot of completed Prometric System Readiness Check n	nust be included
Attach screenshot of completed Systemcheck *	
Upload or drag files here.	



I am aware that I have access to the FDP DEMO exam. The DEMO exam allows me to experience the login, security check-in and handoff to the Proctor. The DEMO will enable me to familiarize myself with the software, including the scientific calculator.

#### This DEMO is created to:

- · familiarize yourself with the log-in and security procedures
- . ensure your environment and equipment pass the security check & check in procedures.
- · learn more about the Prometric test software
- · be prepared for your FDP Exam Day!
- As the FDP candidate, it is my responsibility to pursue scheduling and completion of the DEMO exam.
- Completion of the DEMO exam does not guarantee a flawless RPT experience on exam day.



I understand and acknowledge that if I take an unscheduled break during my session I will not receive additional time, I will have to repeat the security check of my testing environment and person, and the time will be deducted from my exam time. I will be unable to review any questions I attempted before taking a break

☐ I understand that my FDP exam date will be April 23 or April 24, 2023.

☐ I will be notified by the FDP Team with instructions to schedule my Remotely Proctored FDP exam.

By completing and submitting this form I agree that I am selecting to take my FDP Q2-2023 exam via remote online proctoring. I agree to the terms stated in the FDP Candidate Policy Manual.



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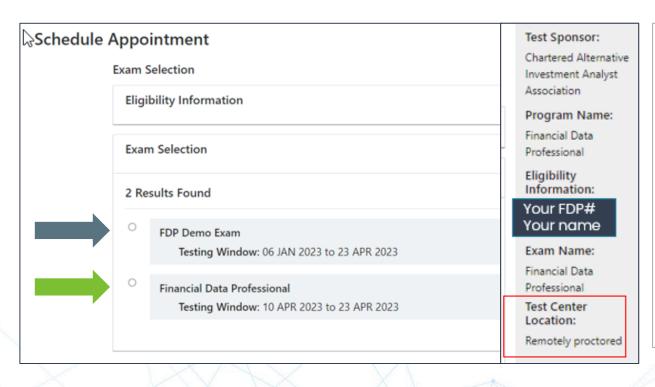
upon completion of your Prometric System Readiness create a screenshot and upload here

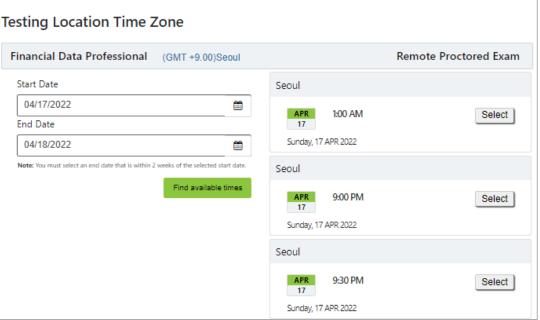


# Scheduling your exam

Schedule your appointment via the appropriate scheduling URL!

Follow the steps on our website.





# FDP DEMO exam

### Make the unknown, your known

This DFMO is created to:

- ✓ familiarize yourself with the log-in and security procedures
- ✓ ensure your environment and equipment pass the security check & check in procedures.
- ✓ learn more about the Prometric test software (work with the calculator!)
- ✓ be prepared for your FDP Exam Day!
  - As the FDP candidate, it is *your responsibility* to pursue scheduling and completion of the DEMO exam. The DEMO is not mandatory, but highly encouraged
  - Completion of the DEMO exam does not guarantee a flawless RPT experience on exam day.

NOTE: FDP candidates registered for the FDP exam have access to one (1) free DEMO.

Additional DEMO's are available for purchase \$35.



### **Our Resources**

Your Planning
DEMO Exam

1. Systems Readiness Check

 Download the ProProctor Application

3. Launch the Exam

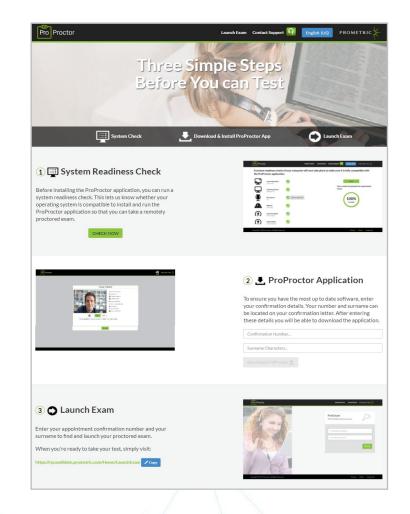
Readiness Agent

Proctor

Start the Exam

Source: <a href="https://rpcandidate.prometric.com/">https://rpcandidate.prometric.com/</a>

You can start this process 1 hour prior to your exam



https://ehelp.prometric.com/proproctor/s/a rticle/PPL-TECH004-ProProctor-Software-Installation-Windows-OS



### FAQ's

#### Difficulty Launching your exam

- https://ehelp.prometric.com/proproctor/s/ (tip: save bookmark)
- click the bottom right-hand chat box for assistance.
- Initially the questions will be from a bot but as you answer questions, it will put you in touch with a live agent who will be able to help trouble shoot your issue.

#### **Company firewall**

- https://ehelp.prometric.com/proproctor/s/article/PPL-TECH003-General-Instructions-for-Corporate-Computers
- > Do not use a VPN connection
- When using a company laptop/ computer connect with your IT staff.

#### What if someone accidently enters the room?

alert household members not to come into the room during the exam. If it happens, the Candidate is to immediately tell them to leave the room. "Please leave, I am testing" If the proctor does not hear the Candidate speak this only, immediately and a conversation ensues with that person coming in, the exam will be revoked.

!! The ProProctor Platform is currently only compatible Google Chrome

Chat with technical support button



If you experience(d) an issue during your exam: contact the FDP Institute at Candidate@fdpinstitute.org



### FAQ's

#### Can I have a UNSCHEDULED (bathroom-) break?

- No. Candidates cannot leave the webcam view while the exam is displayed. If they leave the webcam view at any other time, the exam will be revoked.
- Candidates can only leave during the scheduled break, when section 1 is closed, and section 2 is not yet opened.
- > What if I drop my pencil? ..... Tie it to your desk with a string! What if my WiFi is disconnected?
- > You will not lose time or your progress
- > Wait 3-4 minutes from when you disconnected, reboot your computer, run the system check, and relaunch your exam.

#### What if .....

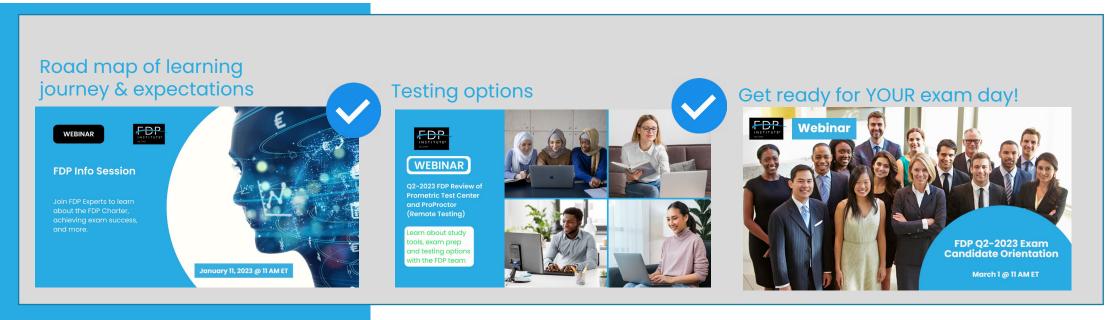
- ➤ I have WIFI problems, and I can't go back in?
- > Someone came into my room, and I am disconnected?
- > I do not agree with what happened during my exam
- > Email us at candidate@FDPInstitute.org
- The FDP team will need 24 hours to review exam experiences and have all the data in to determine next steps

There is a contingency plan in place, the FDP team will determine on a case-by-case basis if candidates are eligible to retake the exam that same week (no extra charge).

Chat with technical support button



If you experience(d) an issue during your exam: **contact the FDP Institute** at <u>Candidate@fdpinstitute.org</u>







How is ESG Reshaping the Alternative Investment Business?

**Date:** February 15, 2023 @ 10 AM ET

Other webinars www.fdpinstitute.org/webinars





Please submit your question

# Thank You



## **Contact Us:**

- fdpinstitute.org
- info@fdpinstitute.org
- @FDPInstitute
- Linkedin.com/company/FDP Institute