

Financial Exam Help 123™

2025 Level III Mock Exam Portfolio Management Pathway

Afternoon Session Exam #1 Questions

Note to Candidates

These questions and essay answer templates are in a separate file from the case scenarios so that you can have both files open on your computer and not have to scroll up and down as you're working to answer the questions. The multiple choice questions have interactive check boxes for you to select your answers, and the templates have editable fields so that you can type in your answers on the screen, much as you will do on the real exam. You may, of course, print the questions and write on them, but I encourage you to do it on the screen; it will be good practice for the real exam.

If you choose to fill in these answers on your computer, please, *please*, *please* remember to save this file frequently; I would feel terrible if I learned that your computer had crashed, and you had lost much of your good work.

Best of luck!

BCIII

Question 1 relates to Institutional Investors – Core Curriculum**GCA Case Scenario**

- 1.1 **Identify** *two* factors of the Plan that will *most likely* contribute to an *increase* in the Plan's ability to take risk, and *three* factors of the Plan that will *most likely* contribute to a *decrease* in the Plan's ability to take risk.

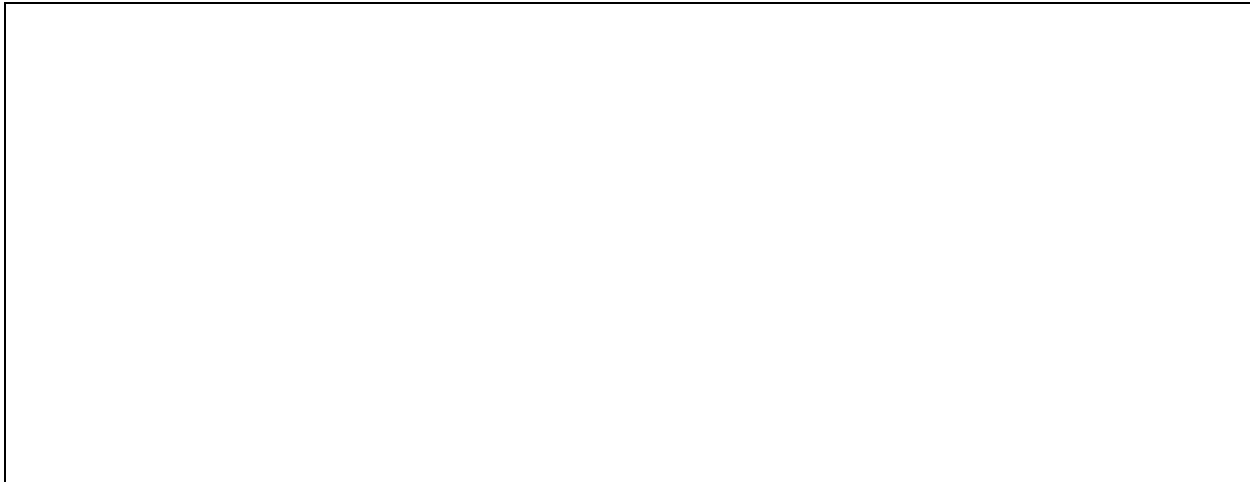
Increase: Factor 1

Increase: Factor 2

Decrease: Factor 1



Decrease: Factor 2



Decrease: Factor 3



1.2 **Formulate** the time horizon section of the Plan’s IPS.