

About Us

Mission Statement

The mission of CFA Societies Canada is to build brand awareness of the CFA[®] designation and to advocate for the highest standards of integrity and ethics for the ultimate benefit of Canadian investors.

Organization Overview

CFA Societies Canada is a collaboration of CFA Institute and our 12 Canadian member societies. We represent CFA charterholders, the 12 societies, and the members of those societies in Canada to policymakers, the media, and the public. CFA Societies Canada aspires to lead the investment management profession in Canada by raising ethical and professional standards, promoting fair markets, protecting investors, and increasing brand awareness.

CFA Societies Canada focuses on three primary objectives:

- Regulatory outreach: a proactive regulatory policy advocate for investors
- Thought leadership: a leading researcher and analyst on policy solutions
- Media outreach: a strong voice for ethics and standards in investment management

In addition to leading Canadian advocacy efforts, CFA Societies Canada manages national projects for the 12 societies, including brand awareness programs, compensation surveys, and university student competitions. We will be responsive to the needs and concerns of our member societies and strive to support local society leaders in their outreach to employers and the media. We will also partner with other organizations on policy positions and projects, as appropriate, in support of our mission.

CFA Societies Canada is governed by a volunteer board of directors representing the 12 societies and CFA Institute. We are funded by an annual grant from CFA Institute, which provides 90 percent of our annual operating costs, and proportional contributions from the 12 societies based on the number of their members. CFA Societies Canada is also supported by CFA Institute with training and services similar to those provided to the 12 member societies.

CFA Societies Canada relies on active volunteers from across Canada to guide our organization and to support our ongoing activities, projects, and policy work. We will employ a small professional staff, including a managing director, who will function as a national spokesperson for Canadian members, and a national relationship manager, who will manage national projects.

[For more information about CFA Societies Canada, visit \[www.cfasociety.org/canada\]\(http://www.cfasociety.org/canada\).](http://www.cfasociety.org/canada)