



**CFA Societies
Canada**

CFA Societies Canada and You

What is CFA Societies Canada?

CFA Societies Canada is a not-for-profit corporation, formed jointly by CFA Institute and the 12 Canadian member societies to lead advocacy and manage national projects in Canada. Our new organization formalizes a long-standing collaborative effort by volunteer leaders across Canada to serve our members and protect Canadian investors. CFA Societies Canada's mission is to build brand awareness of the CFA designation and advocate for the highest standards of integrity and ethics for the ultimate benefit of Canadian investors.

What will CFA Societies Canada do?

CFA Societies Canada will lead national advocacy efforts in the interests of Canadian members and investors by engaging with both provincial and national policymakers. We will work to influence regulatory policy through the publication of comment letters on proposed rules and notices from standard setters, legislators, and securities regulators. CFA Societies Canada will also publish thought leadership papers on issues which it deems are of national importance, meet informally and formally with policy makers, and participate in user advisory groups. In addition to advocacy work, we will coordinate national brand campaigns, university student competitions, compensation surveys, and activities where multiple societies can collaborate to leverage resources for the benefit of members across Canada.

How will CFA Societies Canada work with the Canadian Advocacy Council (CAC) and the Canadian Investment Performance Council (CIPC)?

CFA Societies Canada will lead all advocacy efforts for our members in Canada. The Canadian Advocacy Council (CAC) will become a standing committee of CFA Societies Canada, overseen by its board, and led by the managing director. We expect to continue the excellent work of the CAC with policymakers across Canada, enhancing their resources and enabling them to work more proactively as a voice for Canadian investors. Currently, the Canadian Investment Performance Council (CIPC) operates independently, and we are working with the volunteer leaders of the CIPC to establish the CIPC as a standing committee of CFA Societies Canada, including both board oversight and funding.

Why do we need CFA Societies Canada?

CFA Societies Canada was formed to improve the process for collaboration on national efforts across the 12 societies, to leverage additional resources for the benefit of Canadian members, to build a national brand and establish a national spokesperson, and to supplement our strong volunteer resources with full-time staff. Our new organization will provide enhanced national identity and voice, operational efficiency, leadership continuity, and volunteer support.

How is CFA Societies Canada different from my local society?

CFA Societies Canada serves the needs of the 12 societies and their individual members—providing a central point of collaboration for advocacy efforts, national project coordination, and brand building—where shared resources can be leveraged for maximum impact. All 12 societies work independently to serve their local members with excellent educational offerings, networking opportunities, and other services focused on delivering strong member value.

Do I need to become a member of CFA Societies Canada?

No. CFA Societies Canada has no individual memberships. Individual CFA® charterholders participate as members of one or more of the 12 societies. CFA Societies Canada has been created to represent all Canadian members by serving the 12 societies.

How may I get involved with CFA Societies Canada?

CFA Societies Canada encourages all members to make a priority of supporting their local societies as volunteers. However, we do need volunteers to be engaged on national committees and working groups. Members with interests in advocacy, brand awareness, or national projects should contact their local society board to express interest in CFA Societies Canada.

How do I stay informed about CFA Societies Canada initiatives?

The CFA Societies Canada expects to provide regular communications to individual Canadian members through the 12 societies in the form of emails, newsletters, social media, live presentations, and other avenues. We will also maintain an up-to-date website.

Does CFA Societies Canada have a physical address/location?

Yes. CFA Societies Canada is in Toronto, with offices adjacent to CFA Society Toronto. Our address is: 120 Adelaide St. West, 22nd Floor – Suite #2205, Toronto, ON M5H 1T1, Canada.

CFA Societies Canada: Governance, Funding, and Operations

How is CFA Societies Canada governed?

CFA Societies Canada is governed by a volunteer board of directors representing the 12 societies and CFA Institute. Each society appoints one member to sit on the board, and CFA Institute appoints one member to the board. The Canadian Presidents Council representative (PCR) serves as the nonvoting chair.

Will CFA Societies Canada funding cause an increase in my annual dues?

No. CFA Societies Canada is being funded by an annual grant from CFA Institute and contributions from the 12 societies. Previously, the 12 societies contributed on a per member basis to support the operational costs of the Canadian Advocacy Council, part-time national staff, and national projects.

How will CFA Societies Canada operations integrate with CFA Society Toronto?

CFA Societies Canada will share office space with CFA Society Toronto, but will generally be operated independently. Each organization will have its own full-time staff who report to separate boards of directors and have distinct missions. The two organizations will work to identify potential synergies for cost savings and operational efficiency where possible.

How will CFA Societies Canada determine its policy positions?

CFA Societies Canada will balance its limited resources against the potential for impact, and be selective in the issues we address. We will follow the precedent set by the Canadian Advocacy Council (CAC) in taking policy positions, conducting thought leadership projects, and speaking out through the media. Our priorities are those initiatives that will produce the greatest benefits for the 12 societies, Canadian members, the capital markets, and Canadian investors.

Policy positions of CFA Societies Canada will promote investor protection, transparency and fairness in financial markets, and high standards of ethical and professional conduct in the investment industry. We will strive for consistency with CFA Institute Code of Ethics and Standards of Professional Conduct, and other relevant CFA Institute standards, including prior positions established by the CAC in Canada and CFA Institute globally.

How will the board and managing director work together?

CFA Societies Canada Board will set overall strategy and annual priorities. It will supervise and evaluate the work of the managing director. The board will approve the appointment of the volunteer leaders (chairs and vice-chairs) of the CAC, CIPC, and all other committees, councils, and working groups. The managing director will report to the board and implement organizational strategy.

How will the managing director and its advocacy volunteers work together?

The managing director will oversee and guide the volunteer committee leaders in their development of strategy, processes, and priorities. Together, they will identify, recruit, and train new volunteers.

Where can I get more information about CFA Societies Canada?

CFA Societies Canada maintains a website at www.cfasociety.org/canada.