

About Us

Mission Statement

The mission of CFA Societies Canada is to lead the investment industry in Canada by advocating for the highest professional standards, integrity, and ethics for the ultimate benefit of Canadians.

Organization Overview

CFA Societies Canada is a collaboration of our 12 Canadian member societies. 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. We represent CFA charterholders and the 12 Canadian societies to policymakers, regulators, media, and the public.

CFA Societies Canada focuses on three primary objectives:

Advocacy:

- Proactively identify, respond to, and offer solutions to relevant advocacy matters for Canadian stakeholders.
- Be a trusted source of expertise to regulators, policy makers, and the public.

Collaboration:

- Identify, develop, and execute national initiatives that represent a shared vision among Canadian societies.

Communication:

- Effectively engage stakeholders

In addition to leading Canadian advocacy efforts, CFA Societies Canada pursues mission-driven opportunities guided by its strategic objectives, manages national projects, and facilitates collaboration between the 12 Canadian societies.

There are two national committees of CFA Societies who support the advocacy efforts in Canada; the Canadian Advocacy Council (CAC) and the Canadian Investment Performance Council (CIPC).

The CAC is a council of independently-minded volunteers from CFA societies across Canada and work in a diverse range of areas across capital markets. The CAC strives to advance market integrity, transparency and investor protection, on behalf of CFA Societies Canada and Canadian CFA charterholders.

The CIPC is a council of independently-minded expert volunteers from across Canada and is recognized by CFA Institute as the official sponsor of the GIPS Standards for the Canadian market. The objective of the CIPC is to provide a Canadian perspective and to promote and advance the GIPS Standards in Canada.

CFA Societies Canada is governed by a volunteer Board of Directors representing the 12 societies and CFA Institute. We are funded via CFA Institute and dues from the 12 Canadian member societies based on their membership.

CFA Societies Canada employs a full-time staff of three and relies on volunteers from across Canada to guide our organization and to support our ongoing activities, projects, and advocacy work.

For more information about CFA Societies Canada, visit www.cfasociety.org/canada or follow us on [LinkedIn](#)