

CFA SOCIETY SEATTLE
The premier organization for
investment professionals in the
Puget Sound

WHO WE ARE

CFA Society Seattle promotes the highest ethical standards and professional excellence within the local investment community. CFA Society Seattle is an association of local investment professionals consisting of portfolio managers, Security analysts, Investment advisors and other financial practitioners, serving CFA charterholders and CFA Program candidates locally since 1974.

OUR MISSION

To advance our members investment knowledge and careers by providing educational and networking opportunities, while promoting the CFA charter and investment ethics in the Puget Sound region.

ABOUT CFA INSTITUTE

CFA Institute is a global community of more than 100,000 investment professionals working to build an investment industry where investors' interests come first. Markets function at their best and economies grow. They develop and promote professional and ethical standards and administer the Chartered Financial Analyst credential, the Certificate in Investment Performance Measurement, and the Caritas Investment Certificate. For more information, visit www.cfainstitute.org.



WHAT WE DO

We strive to serve our membership through:

- Membership support services
- Connecting our members to the global network of CFA Societies
- Relevant continuing education programming
- Social gatherings and networking opportunities
- Exam preparation courses and resources
- Career guidance

OUR COMMUNITY

Our local community of more than 1,000 members represent a broad array of industry professions including:

- Asset Management
- Wealth Management
- Investment Banking and Brokerage
- Private Equity
- Corporate Finance and more

We are proud to partner with organizations in our community, including business publications, sponsoring firms, vendor companies, other professional associations, and regional colleges and universities.



BECOME A MEMBER

Regular

- Bachelor's degree or equivalent education or work experience
- Pass Level 1 of the CFA exam or pass the self-administered Standards of Practice Exam
- 48 months of acceptable professional work experience in investment decision-making
- Professional reference statements
- Apply for membership in a CFA Society
- Adhere to and sign the Member's Agreement and the Professional Conduct Statement
- Annual Dues: \$85 CFA Society Seattle and \$275 CFA Institute | Retired members \$37.50
- CFA Society Seattle and \$100 CFA Institute (dues are waived for members 70 years and older)

Affiliate

- Professional reference statements
- Adhere to and sign the Member's Agreement and the Professional Conduct Statement
- Annual Dues: \$100 CFA Society Seattle and \$275 CFA Institute

Student

- Enrolled full-time at a regionally accredited four-year university at the time of application
- Adhere to and sign the Member's agreement
- Sponsored by one regular member and a faculty member
- Annual Dues: \$25 CFA Society Seattle only | CFA Seattle member benefits only

JOIN TODAY!
Visit www.cfaseattle.org