

VOLUNTEER INFO SESSION

Christian Mattenley, CFA
Meyer Aaron, CFA



AGENDA

- CFA Society Victoria Overview
- Volunteer Program Introduction
- Q&A
- Next Steps


MISSION & VISION

CFA Society Victoria serves and connects members, prospective charterholders, and the local investing community by promoting diversity, enhancing financial knowledge, and upholding the highest ethical standards.

QUICK STATS

177 Active Members | 9 Board Members | 8 Committees | Since 1997

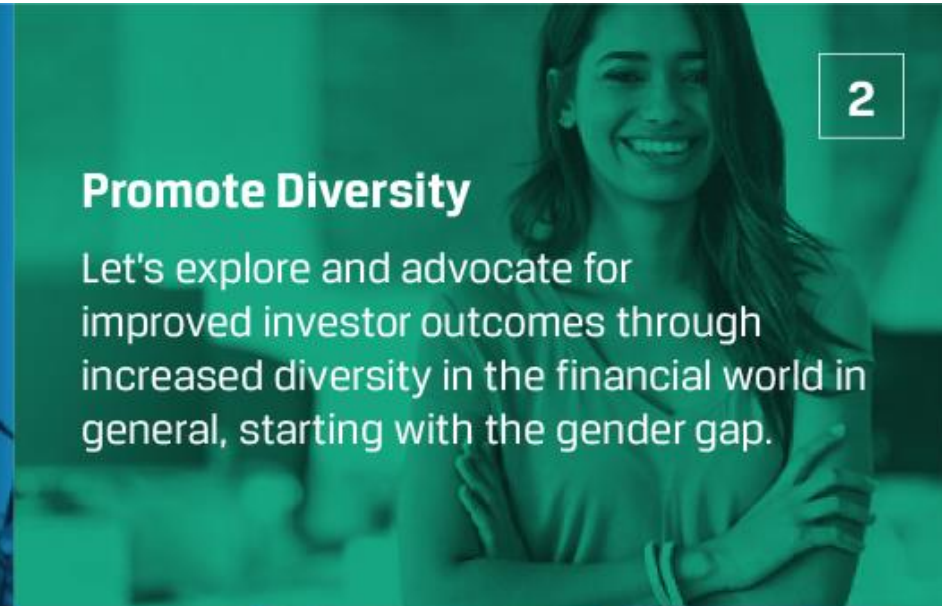
OUR STRATEGIC PRIORITIES



1

Drive Member Value

The fundamental reason the society exists is to help members become the best version of themselves with respect to their careers through education, networking, and professional development.



2

Promote Diversity

Let's explore and advocate for improved investor outcomes through increased diversity in the financial world in general, starting with the gender gap.



3

Support Financial Literacy

To help build a better future of finance we want to help educate others on financial concepts.



4

Uphold Ethics

Ethics is core to increasing confidence and trust in the investment profession.

THE YEAR AHEAD

We continue to serve our members in new and exciting ways. Whether it's a move to host events and programming in virtual capacities, supporting our CFA candidates with the latest exam preparation information, or engaging university students within their new virtual learning environment, we continue to advance our CFA mission and service to the Victoria community.



VOLUNTEER PROGRAM OVERVIEW



CFA Society Victoria's Volunteer Program is designed on simple principles:

- Increase engagement through communication with members about the program and volunteer opportunities
- Reduce the barriers to entry by providing standardization of processes, and materials, without imposing a discouraging level of administrative overhead
- Reward participation through volunteer events
- Recognize the volunteers for their work, within the CFA community, and in the Victoria community generally

Participation in the volunteer program is a path to Board membership.

BENEFITS OF VOLUNTEERING WITH CFA SOCIETY VICTORIA

- Build a volunteer community to support CFA initiatives
 - ✓ Add your voice to the inaugural committee formation
 - ✓ Provide meaningful contribution to your profession
 - ✓ Fantastic networking
- Professional Opportunities
 - ✓ Engage with like-minded individuals
 - ✓ Gain leadership experience within the investment management community in Victoria
 - ✓ Recognition and rewards
 - ✓ Globally recognized volunteer experience

CURRENT VOLUNTEER OPPORTUNITIES

- Diversity & Inclusion
Events, Media, Innovation & Research
- Financial Literacy
Educating the Public & School-Aged Children
- Programming
Securing Speakers & Sponsors



We invite you to pose questions at this time to learn more about our various committees and opportunities. Please click on Zoom's 'Raise Hand' button.

NEXT STEPS

We will send you a Volunteer Application shortly. If you're interested in volunteering with the society, please complete the application and email it to info@cfavictoria.com. We welcome any feedback or suggestions you may have for our Volunteer or other Committees.

Thank you for your time today!