



# WHERE IS YOUR BUSINESS GOING?



CFA Society  
Winnipeg

# HOW IS YOUR BUSINESS GROWING?

You can only take advantage of an opportunity if you know it's there. That's why all companies – regardless of size – need the financial knowledge, global perspective, and analytical expertise that a professional with a Chartered Financial Analyst® (CFA) designation brings. Hiring a CFA charterholder brings unparalleled financial expertise to your team that differentiates your business from the competition.

That's because no credential is as widely regarded in the global financial industry for its focus on current investment knowledge, analytical skill and ethical standards as the CFA designation. It's the yardstick by which the competency and integrity of all portfolio management and investment analysis experts are measured.

## Not where you've been. Where you're going.

For some, a balance sheet is the end of the story. For a CFA charterholder, it's just the beginning. Charterholders don't prepare financial statements; they analyze the results to reveal investment opportunities and advise on the best allocation of your business' capital in order to realize the best return on your investment.

CFA charterholders utilize the breadth and depth of their financial knowledge and put it to work for your company. Bringing a global perspective, but keen Canadian market knowledge to bear, provides companies with a strong foundation on which to build their businesses.

## Too many hats. Too little time.

It's not uncommon for small and medium sized business owners to try to wear too many hats in an effort to safeguard, service and grow their businesses. However, there are some areas best left to an expert. One who has, among other skills, extensive knowledge of corporate finance, asset and debt management, investment and market analysis, mergers and acquisitions, along with an in-depth understanding of alternative investment options. If that's not you – that's okay – we've got you covered.

## Step up. You've earned it.

Developing an investment plan and executing a strategy for charting the direction your business is going and growing isn't just for 'other companies'. It's for your company.

It's for any business owner or leadership team that has a desire to play a proactive role in charting a course for the future of their company. We think that exploring, developing and realizing profit from new and innovative ways of doing business is part of every entrepreneur's DNA. Call it sweat equity.



“Since bringing a CFA charterholder into our leadership group several years ago, our company has undergone significant change and experienced meaningful growth through several complex transactions. As well, we have been able to re-think many of our core strategies particularly in terms of our corporate finance objectives. Without question, we would not have enjoyed our current level of success and would not be so well positioned for further growth, had we not done so.”

Mark Chipman, PRESIDENT & CEO | THE MEGILL-STEPHENSON COMPANY LIMITED

## You work hard for your money. Invest it wisely.

While working hard for your money is part of building your business, ensuring that your money works hard for you, is our business. Utilizing the expertise of a CFA charterholder for your personal portfolio ensures that your hard earned money is in the hands of an expert with international scope, the highest ethical standards, and an analytical capability that exceeds standard investment intelligence.

As a member of CFA Institute, local charterholders belong to a global organization with a leading voice in discussions involving policy and market integrity. In addition, local CFA members benefit from a tight network of financial professionals. Members have access to the most recent academic research on how markets function, as well as continuing education on the latest market intelligence to remain on the cutting edge of developments in finance.

## A Higher Standard. A Better Choice.

Why choose a CFA charterholder? Because in addition to a degree, CFA charterholders are required to complete a three year self-study program, including three, six-hour exams, and a minimum of four years relevant experience. The CFA program is regarded as the most challenging training in the global industry and ensures that those who complete the program and who are awarded the CFA designation represent the gold standard.

By promoting the advanced skills needed to ensure competence and excellence in the workplace, our program sets the standard for investment practices and is respected worldwide as some of the most challenging professional training in the industry. These programs require strong self-motivation and provide CFA charterholders, and those who employ them, a significant competitive edge in the marketplace.

## You don't have to do it on your own. We can help.

We know that businesses that employ or contract the services of CFA charterholders can depend on – and benefit from – the trusted advice, highest ethical standards, and the in-depth global market knowledge and analytical skills that our members bring to your team.

## It's your call.

**Whether you require financial advice for your business or for your personal portfolio, be sure to include an individual with a CFA designation as one of your key requirements.**

The CFA Society Winnipeg is the local member society of the CFA Institute, the global association of CFA charterholders and financial experts with more than 110,000 members in 120 societies globally. Founded in 1952, CFA Society Winnipeg has over 200 members working in a variety of organizations across a broad range of sectors in Manitoba.



**CFA Society  
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*Visit our website today and get  
a CFA charterholder working for you.*  
[www.cfasociety.org/winnipeg](http://www.cfasociety.org/winnipeg)





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