

About CFAI

Mission — The mission of CFA Institute is served by generating value for core investment management professionals and engaging with the core investment management industry to advance ethics, market integrity, and professional standards of practice, which collectively contributes value to society. Core investment management professionals are those individuals primarily involved in activities related to the investment decision-making process—generally portfolio managers, financial advisors, and research analysts on both the buy and sell side. The core investment management industry is comprised of firms (or larger firm business lines) primarily engaged in asset management (mutual funds, hedge funds, private equity, real estate investment, investment research and ratings, and investment advisory services), wealth management, fiduciary asset ownership (such as pension funds, endowments, and sovereign wealth funds), and their related regulators and standard setters.

Vision

- Serve all finance professionals seeking investment management-related education, knowledge, professional development, connection, or inspiration
- Lead the investment profession's thinking in the areas of ethics, capital market integrity, and excellence of practice

CFA Institute seeks to set professional standards for investment management practitioners and broadly engage other finance professionals through their interest and interactions with the investment management industry. Improving outcomes for investors advances our social mission and benefits members through greater demand for educated and ethical investment management professionals.

Contents

Vision.....	3
Mission.....	3
Values	3
1. Professional Development.....	5
1.1. Credentialing	5
2. Value	6
2.1. Success	6
3. Markets.....	7
3.1. Benefits.....	7
Administrative Information.....	7

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CFA Institute (CFAI)

Stakeholder(s):

Investment Management Industry :

As a global, independent organization, we play a role in being a steward and champion of the investment management industry.

Investment Management Professionals :

In addition to direct benefits to their clients, the work of investment management professionals and the impact of the investment management industry also benefits society through improved investor outcomes and the resulting effective allocation of capital that drives economic growth and development.

Society

Investors

Financial Markets :

We believe that financial markets and services should operate in the following ways:

- *Investment professionals contribute to the ultimate benefit of society through the sustainable value generated by efficient financial markets and by effective investment institutions.*
- *Good stewardship and high ethical standards are necessary for trust and confidence to be secured and for society to be served. Financial markets should afford every investor the opportunity to earn a fair return.*
- *Financial markets are more effective with knowledgeable, diverse participants.*
- *High ethical principles and professional standards are essential to positive outcomes; rules and regulations, while necessary, are not sufficient by themselves.*

Financial Services

Vision

Fair and efficient global financial markets

Mission

To lead the investment profession globally by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

Values

Trust: We act with integrity, are ethical and authentic, and speak the truth in a timely, transparent manner.

Service: We understand the needs of our external stakeholders and, together, deliver exceptional results through a regional model, localized where appropriate.

Inclusion: We create a welcoming, safe environment where fairness, opportunity, and trust exist, allowing us to leverage the diverse talents and perspectives of our staff and volunteers to achieve our strategic objectives.

Curiosity: We demonstrate an unrelenting pursuit of knowledge and understanding in our quest for excellence.

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1. Professional Development

Develop future professionals

1.1. Credentialing

Offer credentialing programs

through relevant and accessible credentialing programs

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2. Value

Deliver member value

2.1. Success

Accelerate the professional success of our members
that accelerates the professional success of our members

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3. Markets

Build market integrity

3.1. Benefits

Benefit investors and our members that serve them

that benefits investors and our members that serve them

Stakeholder(s):

Investors

Administrative Information

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