

# SHAPING A BETTER FUTURE OF FINANCE

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CFA Institute is a global community of investment professionals working to build an investment management industry where investors' interests come first, financial markets function at their best, and economies grow.

We are driven by the belief that lasting economic growth depends on trust, competence, and transparency in financial markets, and we know that it must be led by professionals who are ethically centered and professionally trained.

In short, we are here to lead, support, and connect all who want to create a better investment industry.

## BUILDING MARKET INTEGRITY

Thriving financial markets require a culture in which investment professionals place trust, transparency, and investors' interests first—no matter what the incentives. That's why a commitment to professional ethics that advance fair and efficient markets is at the core of all we do at CFA Institute.

We advocate for financial market integrity and develop and promote ethical and professional standards, such as the Global Investment Performance Standards (GIPS®) and the Asset Manager Code of Professional Conduct™, and our members uphold our industry-leading Code of Ethics and Standards of Professional Conduct.

more than  
**130,000** MEMBERS  
in more than **150** COUNTRIES

**145** LOCAL SOCIETIES  
WORLDWIDE

GIPS Standards championed  
locally in more than **35** COUNTRIES

more than  
**1,100** FIRMS  
adhere to the Asset Manager  
Code of Professional Conduct

## DELIVERING MEMBER VALUE

Our growing community of members and societies represents the foremost professional body in investment management. They embody and amplify our mission to lead the investment management profession globally.

Societies play a critical role in localizing our global mission in the cities and regions where they practice, fostering professional standards of ethics and integrity as well as nurturing relationships with members, candidates, and stakeholders.

Together, we aim to put investors' interests first and to safeguard the financial system.

## DEVELOPING FUTURE PROFESSIONALS

We offer a world-class suite of educational offerings to students, working professionals, regulators, and journalists who are shaping the future of finance. Through our formal educational programs, professional development courses, and global network of university partners, we aim to deepen financial expertise for the benefit of investors worldwide.

The Chartered Financial Analyst® (CFA®) credential is the most respected and recognized investment management designation in the world. The curriculum covers academic theory, current industry practice, and ethical and professional standards to provide a strong foundation of advanced investment analysis and real-world portfolio management skills. A work experience requirement and an annual ethics statement ensure career-long professional excellence by those who have earned the CFA charter.

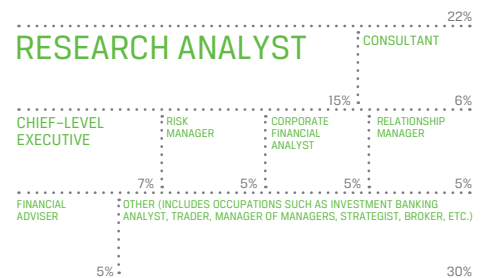
The Certificate in Investment Performance Measurement (CIPM®) is an advanced credential that supports the allocation process and focuses on evaluating investment management skill, including performance analysis and attribution. The curriculum emphasizes the application of manager selection and dismissal criteria, ensuring that firms identify and retain the best talent.

Bank of America Merrill Lynch  
Citigroup  
Credit Suisse  
Deutsche Bank  
HSBC  
JP Morgan Chase  
Morgan Stanley Smith Barney  
RBC  
UBS  
Wells Fargo

Top employers of members globally.

The Claritas® Program covers the essentials of finance, ethics, and investment roles, providing a clear understanding of the global investment industry. It is best suited to those working in the industry in noninvestment roles, such as marketing, HR, and IT.

## PORTFOLIO MANAGER



Top occupations of members globally.

\*Data accurate as of July 2015