

# SHAPING A BETTER FUTURE OF FINANCE

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CFA Institute is a global community of investment professionals working to build an investment 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.

## CHAMPIONING ETHICAL BEHAVIOR

Thriving financial markets require a culture where 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  
**150,000+** MEMBERS  
in more than **165** COUNTRIES

more than  
**148** LOCAL SOCIETIES  
WORLDWIDE

GIPS championed locally in more than **40+** COUNTRIES

more than  
**1,300** FIRMS adhere to the Asset Manager Code of Professional Conduct

GIPS championed locally by  
**1,400** FIRMS in **40+** COUNTRIES

## CREATING A STRONG GLOBAL INVESTMENT COMMUNITY

Along with local CFA societies around the world, we build strong relationships with all participants in the investment community, including regulators and legislators, universities, and commercial organizations.

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

## RAISING STANDARDS OF PROFESSIONAL EXCELLENCE

The Chartered Financial Analyst® (CFA®) credential is the most respected and recognized investment 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 attestation to ethics ensure career-long professional excellence by those who have earned the charter.

The Certificate in Investment Performance Measurement (CIPM®) is an advanced credential that signifies global, practice-based investment performance and risk-evaluation skills. The curriculum covers advanced investment performance evaluation and professional standards.

The Investment Foundations® 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 non-investment roles such as marketing, HR, and IT.

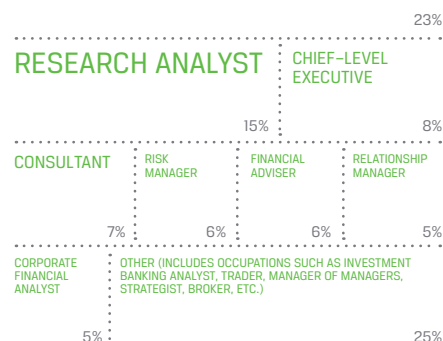
JP Morgan Chase  
RBC  
UBS  
Bank of America Merrill Lynch  
Wells Fargo  
HSBC  
Morgan Stanley Smith Barney  
Citigroup  
BlackRock  
Goldman Sachs

\*Data accurate as of December 2017

Top employers of members globally.

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 to the benefit of investors worldwide.

## PORTFOLIO MANAGER



Top occupations of members globally.