

The Five Ws: The Right Question Marketing Campaign

Targeting high-net-worth investors in the U.S. and Canada

CFA Institute is embarking on a journey to build awareness of CFA® charterholders among high-net-worth investors (HNWIs) in the United States and Canada through a multiyear marketing campaign.

The Right Question campaign was informed by a comprehensive research project that surveyed CFA charterholders, noncharterholder practitioners, CFA Program candidates, and HNWIs in the United States and Canada. Our learnings about these audiences helped frame our campaign strategy.

Who?

HNWIs in the United States and Canada with US\$3 million or more in investable assets. The research revealed that those with higher wealth levels place significant value in the experience and investment savvy of their wealth manager. This is primarily why CFA charterholders are best positioned to help them achieve their investment priorities.

What?

The Right Question campaign is designed to increase awareness among HNWIs about the unique value of CFA charterholders. Targeted at HNWIs with more than US\$3 million of investable assets, the campaign will position the role of investing as being at the epicenter of private wealth management. By highlighting the investment expertise of CFA charterholders, the campaign will make it clear to HNWIs that charterholders are the premier choice to help investors unlock their most ambitious goals.

Where?

The Right Question campaign is a cross-channel campaign that includes print, digital, TV, video, radio, and out-of-home experience ads. The media plan is being rolled out nationwide in the United States and Canada. It represents a mix of business and finance partners—including the *New Yorker*, *Wall Street Journal*, CNBC TV, and NPR—that HNWIs consume regularly, along with such areas of interest as sports and leisure.

When?

The first phase of the campaign goes live on March 4, 2019, and will run through early June, 2019, backed by a planned spend of US\$50 million over a four-year period. We expect to be back in market in the fall.

Why?

To support our growing number of members in private wealth. Ninety percent of the CFA charterholders in the Americas region who primarily manage private assets or serve private clients indicated that raising awareness among HNWIs was a top priority in importance in our 2017 annual member survey. The research projected a similar sentiment: Promoting the value of the CFA charter was identified as the most important thing CFA Institute could do for its members.



LEARN MORE

Visit Marketing Resources for CFA Charterholders under Member Benefits at cfainstitute.org



STAND OUT

Include your CFA designation in your LinkedIn profile, so prospects looking for a CFA charterholder can easily find you.