ABOUT US

- CFA Institute is a global not-for-profit investment education and professional organization (with offices in the United States, United Kingdom, China, India, Hong Kong, and Belgium).

- CFA Institute is the leading voice for developing and setting the highest educational and professional standards in the investment industry.

- Our members, candidates, member societies, and many institutional, regulatory, and academic partners together form a strong global community of like-minded investment professionals.

- Our goal is to serve the interests of investors for the ultimate benefit of society.

- We all have a responsibility and a role to play in building a stronger and more accountable investment industry.
OUR STRATEGY AND OUTCOMES

**STRATEGY**

- **Develop Future Professionals**
  Through relevant and accessible credentialing programs

- **Deliver Member Value**
  That accelerates the professional success of our members

- **Build Market Integrity**
  That benefits investors and our members that serve them

**OUTCOMES**

- **High standards of entry and professionalism**
- **Educated, ethical members at the top of their profession**
- **Regulations that align firms and clients**

Business models geared toward achieving investor outcomes
OUR STRATEGIC PLAN

CFA Society Providence
Member Engagement & Recognition
- Highlight and Promote Member Engagement
- Provide Opportunity to Give Back

Strategic Areas of Focus
1. Deliver Member Value
2. Build Market Integrity
3. Develop Future Professionals

University Engagement
- "Financial Club Presidents Council"
  - Leverage volunteers

Strategic Alliances
- Junior Achievement
- Jump$tart RI
- FPA RI
- RI Council for Economic Education

CFA Institute
2018 PARTNERSHIPS

Rhode Island
JUMP$TART!
FINANCIAL SMARTS FOR STUDENTS

Junior Achievement
of Rhode Island

Rhode Island
COUNCIL FOR
ECONOMIC
EDUCATION
Teaching Opportunity

RHODE ISLAND COLLEGE

CFA Institute
Both Self-Determination Theory and BIS/BAS assert that the environment is a critical factor in our motivation. Fortunately, it is also the one over which we have the most control.

By creating an environment that supports autonomy and ownership, you create phi. The right environment includes vision, goals, values and beliefs, teaching and coaching, and re-examination of critical assumptions; as well as fair, controllable and transparent rewards.

We offer three simple recommendations for investment leaders to create the environment to maximize phi.

Leaders Need to Cultivate

- Purpose
- Habits
- Incentives
PARTNER WITH US

Email us at info@providence.cfiasociety.org
Use “Financial Literacy” in the Subject Line