

CFA SOCIETY PROVIDENCE FINANCIAL LITERACY INITIATIVE

Al Cumplido
Financial Empowerment Roundtable
4/17/2018



**CFA Society
Providence**



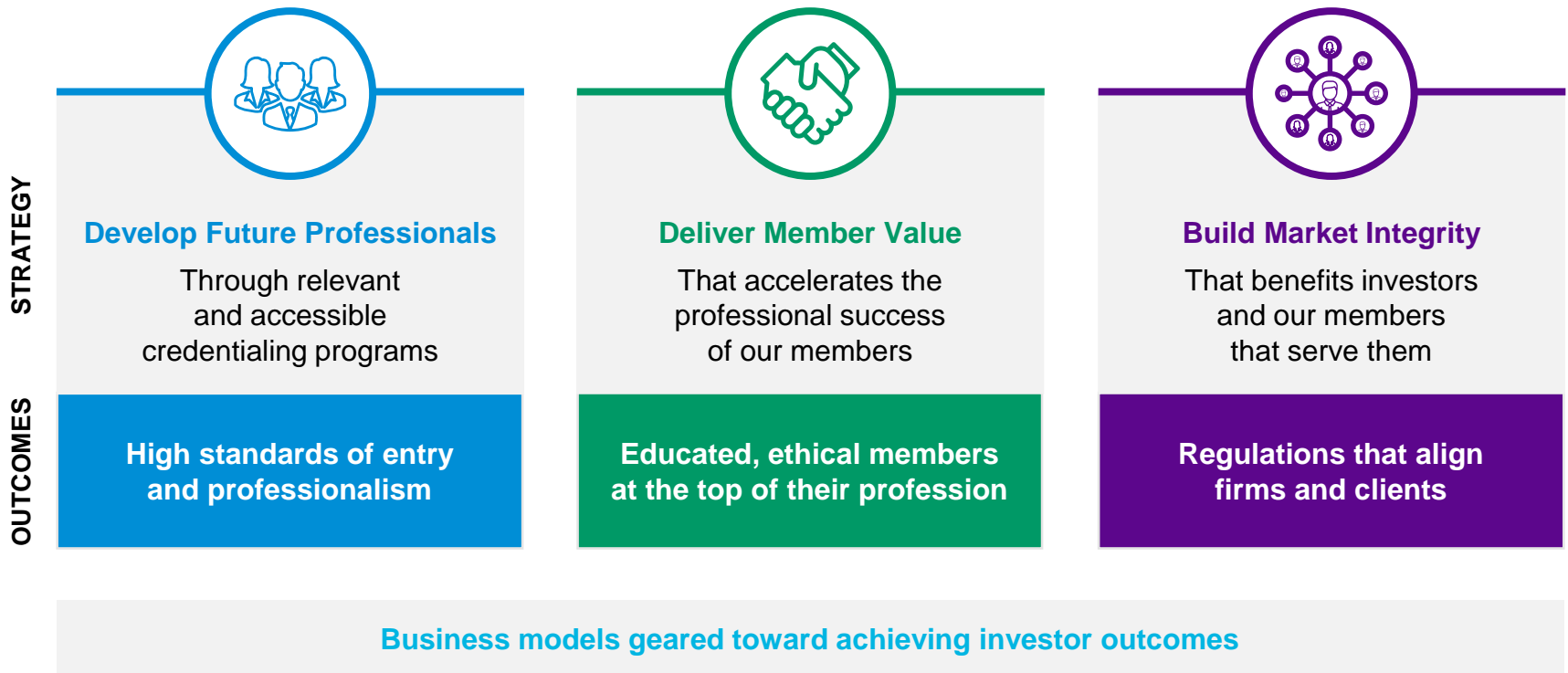
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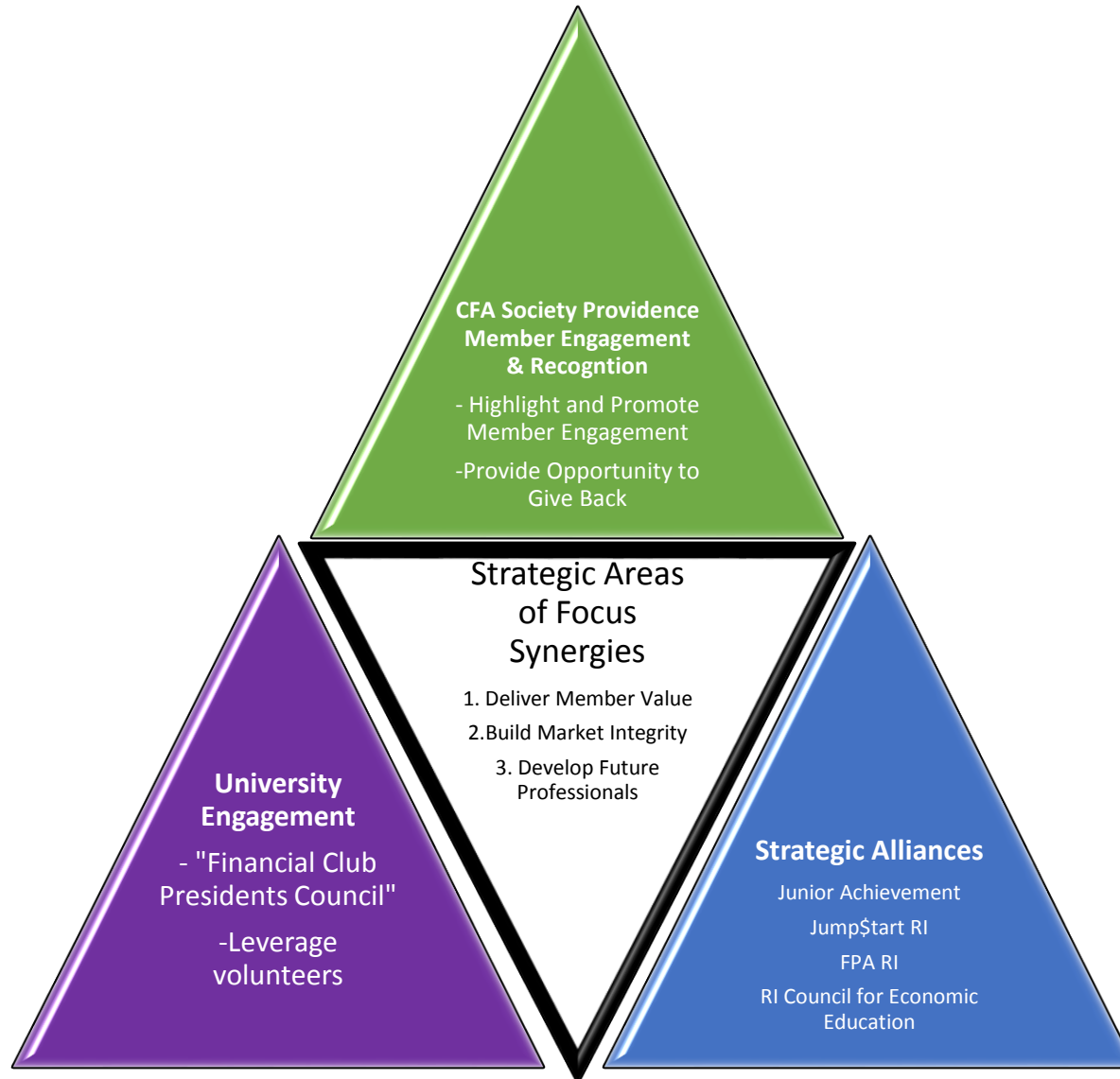
ABOUT US

- 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



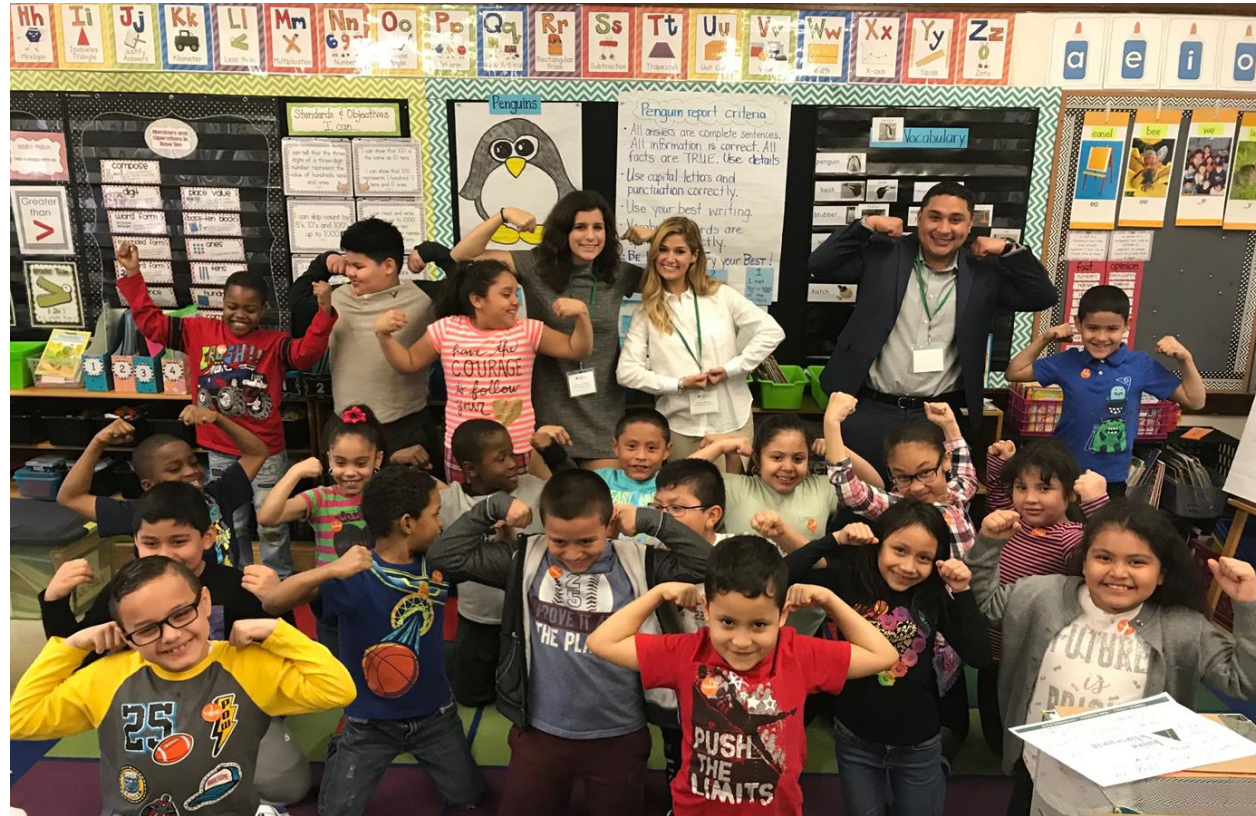
OUR STRATEGIC PLAN



2018 PARTNERSHIPS



RHODE ISLAND COLLEGE



PUTTING THE 'PHI' IN FINANCE

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



PARTNER WITH US



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Email us at info@providence.cfasociety.org

Use “Financial Literacy” in the Subject Line