

Global Key Messages

The **CFA charter** is a global gold standard that demonstrates an investment professional's expertise, skill, and ethical focus.

The **CFA Institute Centre for Financial Market Integrity** is the global policy authority on professional and performance standards, financial reporting, and capital markets.

CFA Institute is the global association for investment professionals.

CFA Institute provides a designation of distinction to the financial community--building discipline, character, and excellence in the financial world.

The **CFA Program** stands for / is recognized for excellence, not only in knowledge but in character of the individual. As such it is a touchstone for the whole financial industry, building discipline, character, and excellence in the financial world.

CFA charterholders are knowledgeable, relevant, and place investors' interests first. They come to the table with experience.

The **CIPM program** offers the industry's only designation dedicated solely to the specialized field of investment performance evaluation and presentation.

What does CFA Institute do? CFA Institute promotes the highest ethical standards and offers a range of educational opportunities online and around the world.

What does the CFA Institute Centre do? The CFA Institute Centre levels the playing field for investors through its advocacy and standard-setting work.

CFA Institute Ad Campaign Messages

Ethics Tenacity Rigor Analytics

Private Wealth Management

When someone has achieved the CFA designation—make no mistake he or she is well aware of ethical responsibilities. He upholds the Code of Ethics and Standards of Professional Conduct. She knows why GIPS standards were created and to whom they apply. He has acknowledged his obligation to act in an ethical manner and to encourage others to do the same, with integrity, competence, diligence, and respect. The letters CFA indicate that this individual is committed to putting the investor's interest first at all times.

The CFA charter requires a candidate to attain four years of relevant work experience and to pass three exams—each demanding a minimum of 250 hours of study. The CFA Program is a self-study curriculum, generally pursued while a candidate is employed full-time in the financial industry with all the requisite obligations of life: family, community, etc. Employers in the financial industry are well aware of the inherent tenacity represented in the letters CFA and what that tenacity brings to an organization.

The CFA charterholder has an appetite for intellectually difficult work, for self-paced achievement, and for an unambiguous ethical standard. The letters CFA indicate that this person has the ability to face the rigor of a higher bar.

If a CFA charterholder sits before you, she or he can evaluate undervalued and overvalued securities, calculate the values of callable bonds and puttable bonds, calculate alpha, calculate financial ratios used by credit analysts, analyze derivatives, alternative investments, taxes, pensions, inventories, and inter-corporate investments. This list is by no means comprehensive. But its meaning is clear. The designation of CFA represents a reservoir of tremendous analytical skills.

What the CFA designation means to investors: a financial adviser who is a CFA charterholder represents a tremendous reservoir of investment expertise, having demonstrated commitment to the highest standards of ethical and professional conduct, and comprehensive knowledge of investments and analytics.