DO:

1. Use your society title/designation when speaking in your capacity as a society employee or volunteer.
2. Explain the role of the society and charterholders in terms of the mission.
3. Explain or speak about a trend, issue, or challenge in terms of its impact on the investment industry. Do not make broader economic or political statements.
4. Support your statements with relevant data or content from CFA Institute research, surveys, or other reports.
5. Confine comments and statements to be investment industry-specific.
6. Consult with a CFA Institute representative if you are unsure about a policy or official position.

DO NOT:

1. Opine on political issues or individuals when speaking as a representative of your society.
2. Suggest that your personal views are those of the society or CFA Institute.
3. Use your society designation when expressing political or personal views, or the position of your firm.
4. Use your society social media channels to express and share your opinions about sport, current affairs, politics, religion, or anything that is not an official view or position of CFA Institute or your society.
5. Make claims about the superior investing acumen of charterholders or anything that could be construed as suggesting that charterholders deliver superior investing outcomes.
6. Imply or state that you are a representative of CFA Institute.

Society staff or volunteers may only and exclusively use their society designation in the media or speaking publicly when commenting on issues or topics that have been approved by CFA Institute. They are not permitted to comment as a society representative on political or policy matters that do not represent the official position of CFA Institute.