

How It All Works Together



Vision	Empowering the investment industry to realize the world's greatest possibilities		OUR PURPOSE ON THIS PLANET.
Mission	To lead the investment profession globally by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.		OUR MISSION IS UNCHANGING, GUIDING WHO WE SERVE, WHAT WE DO, AND HOW WE DO IT.
Goals	<ul style="list-style-type: none"> • Increase influence across the ecosystem • Increase the global constituent base of the CFA Institute • Increase scale and diversity product portfolio 		OUR MEASURABLE OUTCOMES
Strategies	<ul style="list-style-type: none"> • Shape the future of the industry and the profession • Build a diverse portfolio of learning products • Modernize and grow the CFA program • Develop exceptional customer experiences 		HOW WE'LL WORK NOW TO ACHIEVE OUR PURPOSE TODAY AND TOMORROW.
Operating Model	<ul style="list-style-type: none"> • Culture and talent • Processes • Measures and motivators • Technology and tools • Data 	<ul style="list-style-type: none"> • Governance • Societies • Product 	HOW WE'RE DESIGNED TO MEET CUSTOMER, EMPLOYEE, AND SOCIETIES' NEEDS.
Society Operating Model	<ul style="list-style-type: none"> • Our organizing framework • Engagement & Input • Membership Strategy & and Community • Learning & Innovation 	<ul style="list-style-type: none"> • Promotion & Outreach • Technology & Tools • Funding & Staffing • Governance & Training 	HOW WE WILL WORK WITH SOCIETIES TO ACHIEVE OUR GOALS