



November 2020

USING THE CFA SOCIETY AND CFA INSTITUTE BOILERPLATE

Guidelines for Societies

Media releases issued by CFA societies must carry the appropriate boilerplate(s) to ensure that the purpose of CFA Institute and member societies is consistently conveyed in all markets.

Societies are encouraged to work with a trusted translation partner to ensure the availability of accurate translations in good time, and to ensure that their society president reviews and approves the final version of the translation for accuracy and appropriate local language nuances before the text is used.

The two new boilerplates are outlined below, with accompanying guidelines for their use:

Boilerplate one

We propose that societies use Boilerplate One as their default boilerplate. Boilerplate One describes the local society within the context of the broader member network and its relationship to CFA Institute. Boilerplate One should work for most communications that originate in the local market, as well as those originating from CFA Institute research and advocacy functions.

EXCEPTION: CFA Program and credentialing-related announcements require Boilerplate Two. Please see next page.

About CFA Society [Location]

Founded in [Year], CFA Society [Location] is part of the worldwide network of CFA Institute member societies that lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. CFA Society [Location] represents the interests of [number of] investment professionals in [location] through advocacy, education, events, and professional development. CFA Institute, the global association of investment professionals, sets the standard for professional excellence and credentials and is a champion of ethical behavior in investment markets and a respected source of knowledge in the global financial community. There are more than 160,000 CFA charterholders worldwide in 164 markets. For more information visit [website and www.cfainstitute.org] or follow [social media].

Examples of Boilerplate One use might include, but are not limited to:

- New society leader announcements
- Conference and event agenda announcements
- Research Challenge and Ethics Challenge winner announcements
- Editorial contributions [About the Author box]
- Local release of CFA Institute surveys, research and reports

Boilerplate two

We require that societies use Boilerplate Two [together with the CFA Institute boilerplate] for all CFA Program and credentialing-related announcements. This includes all exam related news including the announcements detailing results from the June and December examination sittings. Boilerplate Two is shorter, because it will always be accompanied by the CFA Institute boilerplate.

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About CFA Institute

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion of ethical behavior in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors' interests come first, markets function at their best, and economies grow. There are more than 160,000 CFA charterholders worldwide in 164 markets. CFA Institute has nine offices worldwide and there are 159 local member societies. For more information, visit www.cfainstitute.org or follow us on Twitter at @CFAINstitute and on [facebook.com/CFAINstitute](https://www.facebook.com/CFAINstitute).

Important

Both Boilerplate One and Boilerplate Two include CFA Institute figures that change weekly. Please check the accuracy of the boilerplate figures with your society relationship manager or via the CFA Institute [Press Room](#) by clicking into the most recent media announcement.

