



CFA Society  
Boston

# FINANCIAL LITERACY

CFA Society Boston's Financial Literacy Initiative's mission is to close the financial literacy gap by imparting financial knowledge without conflicts of interest, thereby improving the lives of the current and future investing public, the credibility of our industry and ultimately, the stability of our economy.

## OUR MISSION

## HOW IT WORKS

### CONTACT

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This community outreach program strikes alliances with non-profit groups to reach a wide variety of audiences, from late high school onward. Since its inception in 2014, the initiative has touched thousands of people, partnered with over 30 organizations, and currently has over 30 active volunteers. This community outreach program makes valuable financial literacy content available to the general investing public (high school onward) through alliances with non-profit groups. The initiative addresses issues such as Personal Finance, Basics of Investing, Retirement, Bonds vs. Equities, Choosing a Bank, and more.

## ABOUT CFA SOCIETY BOSTON

CFA Society Boston is dedicated to putting investors first and raising ethical standards within the investment profession. We unite Boston's investment community and provide a forum for collaboration, education, and innovation. Originally called the Boston Security Analysts Society, Inc., we are a non-profit professional society founded in 1946. In 2017, we became CFA Society Boston. More than 6,000 investment professionals locally and globally are members of CFA Boston, representing over 650 investment firms. 96 percent of CFA Boston members hold the Chartered Financial Analyst designation from CFA Institute.



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## BECOME AN ALLIANCE

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### PRESENTATION TOPICS

- Active vs. Passive Investing
- Banking
- Budgeting and Planning
- Basics of Investing
- Borrowing and Credit Scores
- Careers in Finance
- Introduction to Equity and Bonds
- Investing for Retirement
- Investing for Teens
- Paying for Education
- Rent vs. Buy/First Time Homeowner
- Saving
- Teaching Children About Personal Finance
- Understanding Your Taxes



### WHAT WE COMMIT TO

- Provide neutral, expert presenters
- Set up and present topics
- Supply the presentation / activity
- Bring a laptop and materials
- Be experienced in presenting in a virtual setting



### WHAT YOU COMMIT TO

- Provide the audience and venue, either in-person or virtual
- Promote the event onsite, local newspapers and website
- Make a projector or USB connection available
- Briefly introduce presenter(s)
- Complete a post offering survey



### READY TO START

Complete the online inquiry form and a member of leadership will follow up with you directly.

**START NOW**