



CFA Society
Boston

2023

ANNUAL REPORT

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Our Mission

CFA Society Boston members promote the highest ethical standards, best practices and professional development within the investment industry to educate and build trust in the community it serves.

Our Vision

CFA Society Boston represents a diverse membership of investment professionals positively impacting society through well-informed financial decisions.

About Us

CFA Society Boston is dedicated to putting investors first and raising ethical standards within the investment profession. 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. There are more than 190,000 CFA® charterholders worldwide in more than 160 markets. CFA Institute has nine offices worldwide and there are over 150 local societies. CFA Society Boston is the 5th largest CFA Society in the world.



**CFA Society
Boston**



Year in Review

CFA SOCIETY BOSTON



MEMBERSHIP

- 6000+ Society Members
- 96% Charterholders
- Over 650 firms represented
- 2433 Candidates in the Greater Boston Area

ENGAGEMENT

- 150 Active Volunteers
- 24 Mentor Match Pairings
- 9 Research Challenge Teams
- 6 Participants in the CFA Society Boston University-College Partner Program



COMMUNITY IMPACT

- 39% of all CFA Institute DEI Code (USA & Canada) Signatories are represented in Boston
- 6 Undergraduate Women in Investment Management Internships Offered
- 6 CFA® Scholarships Awarded
- 22 Students Participated in the UNCF Lighted Pathway Program
- 20 Financial Literacy Alliances Served
- Over 800 community members educated through the CFA Society Boston Financial Literacy Initiative

The engagement and work of the dedicated CFA Society Boston members is what makes all of this possible. We thank all that have worked tirelessly throughout the year to make the society's initiatives so successful.

Not a member? Learn more at www.cfaboston.org/join.
Already a member? Visit www.cfaboston.org/volunteer

Programs and Events

CFA Society Boston is proud to offer endless opportunities for our members to develop and continue shaping their craft. Members are encouraged to fully participate in comprehensive and highly regarded professional programs, both live and virtual, as well as to build their community through various networking opportunities



Live Educational Programs

11 In-person educational programs on a variety of topics including, Sustainable Investing, FinTech, Career Development, Private Wealth Management, and more.

367 Attended a live educational program or conference.



Virtual Educational Offerings

15 Virtual educational programs were offered in the 2022-2023 membership year, including webinars, interactive Career Chats, and online courses.

207 Participated in virtual educational offerings.



Networking Opportunities

21 In-person networking events including the Annual Market Dinner, Coffee Connections, Charterholder Ceremony, and Networking Receptions.

909 CFA Society Boston members and guests attended networking events.