



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

This community outreach program aligns 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 through collaboration with our alliance partners. The initiative addresses issues such as Personal Finance, Basics of Investing, Retirement, Bonds vs. Equities, Choosing a Bank, and more. Since its inception in 2014, the initiative has grown year-over-year in multiple ways: 1) Member Engagement; 2) Active alliances; 3) Number of lives touched.

Financial Literacy is a key part of the society's strategic plan and we are proud that our volunteers are truly making a difference in people's lives, and fulfilling our mission to "educate and build trust in the community we serve."



FINANCIAL LITERACY

BECOME A VOLUNTEER

QUESTIONS

FINLIT@CFABOSTON.ORG

P. 617.641.8642

[CONNECT.CFABOSTON.ORG/
VOLUNTEEROPPORTUNITIES](http://CONNECT.CFABOSTON.ORG/VOLUNTEEROPPORTUNITIES)

VOLUNTEER OPPORTUNITIES

- Create/vet educational materials
- Instruct classes online or in-person based on your availability
- Serve as an Alliance Leader
- Internal CFA Society Boston FinLit initiatives



PRESENTATION TOPICS OFFERED

- 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

GET STARTED

All CFA Society Boston Members in good standing are eligible to volunteer. Just complete the Financial Literacy application in the Volunteer HQ.

[START NOW](#)