



CFA Society
Boston

80
Years

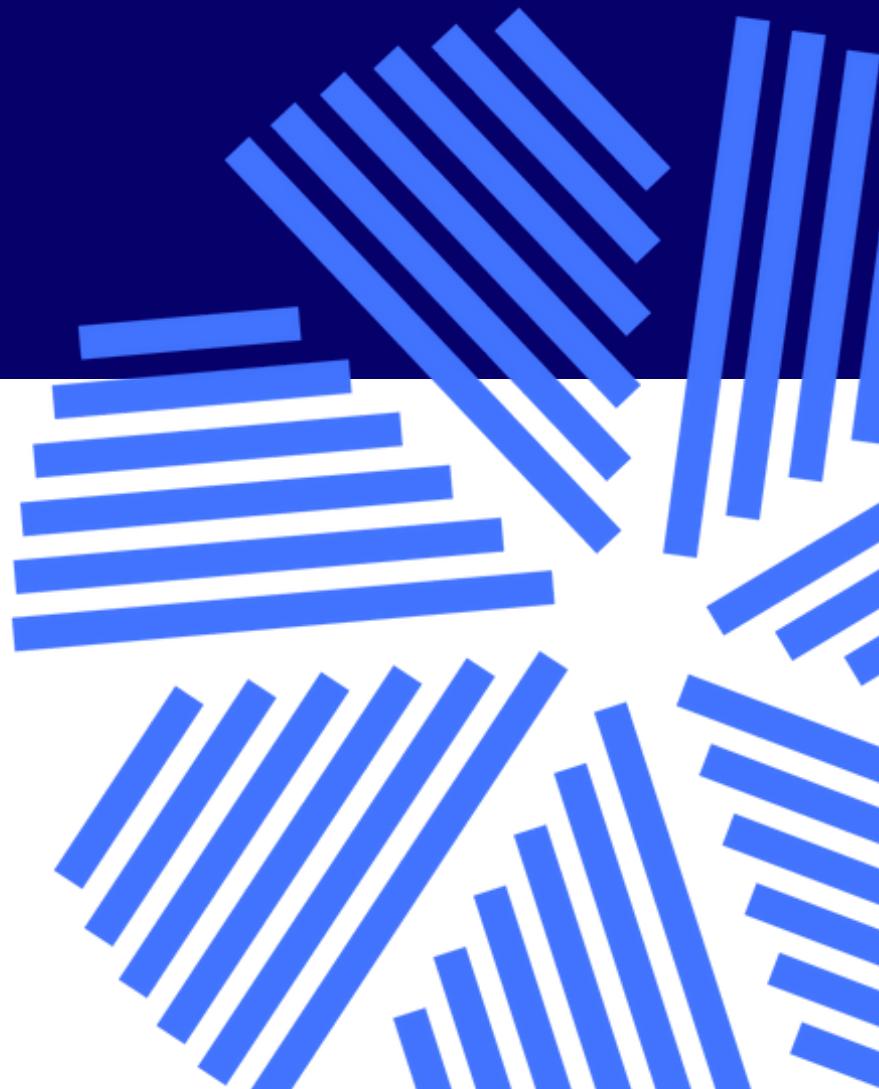
University College Partner Program

for Professors and Sponsors

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About Us

CFA Society Boston is committed to advancing ethical standards and putting investors first in the financial industry. Founded in 1946 as the Boston Security Analysts Society, we have a long-standing tradition of fostering integrity and professionalism in investment management. In 2017, we became CFA Society Boston, aligning our name with the global CFA Institute while continuing to serve as a trusted hub for finance professionals in Greater Boston.

As the 4th largest CFA Society in the world with over 6200+ vibrant members, we are part of a powerful global network of over 200,000 CFA® Charterholders and more than 155 local societies. Together, we are helping shape a more transparent, ethical, and investor-focused investment profession.

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.

Vision

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



What is the University Partner Program?

The University College Partner Program is designed to make it easier for students across New England to engage with CFA Society Boston, build connections, and explore opportunities in the investment industry. This summary provides a clear, student-friendly overview of the program, perfect for sharing with schools or presenting on pitch calls.

Why Become a University-College Partner?

The program helps schools support their students' career journeys by simplifying the membership process. Partner schools allow verified students to bypass the two required sponsor forms, making joining easier and faster.

Program Requirements

To participate, a university or college must:

- Have a main campus in one of the five New England states
- Offer courses related to the finance industry
- Verify student applicant status through a dedicated admin or professor
- Not require CFA Society Boston membership as a course or program requirement



What Students Gain:

Mentor Match Program

A structured opportunity to connect with experienced professionals for personalized guidance.

Career Development

Access to career resources, networking opportunities, program discounts, and CFA candidate study groups. Specialized educational programming designed for students.

Leadership & Service

Volunteer opportunities that build leadership experience and expand professional impact.

Active Online Communities

Offering a Student-specific community for like-minded individuals. Plus, engagement with specialized groups in Fintech, Sustainable Investing, Global Markets & Macro, Private Wealth & RIAs, Quantitative Methods, & more.

University Benefits:

Demonstrates the university's commitment to excellence in finance education by exposing students to the value of the CFA Charter and affiliation with CFA Society Boston

Signals to employers that graduates are prepared to uphold the highest ethical and professional standards in the investment industry.

Builds a bridge between academia and the professional investment community



Membership Details & FAQs

- Student membership is complimentary while eligible (up to 4 years)
- Universities participate in the program at no cost
- Students who register for the CFA Exam may transition to a complimentary candidate membership at renewal
- Membership runs on a July 1 – June 30 cycle, with renewal required each year

New for Student Members!

The CFA Society Boston Connect Mobile App



Get Involved - Apply Today!

We are now accepting institution applications for the University-College Partner Program.

Scan the QR Code to begin your partnership today.

