



CFA Society  
Boston

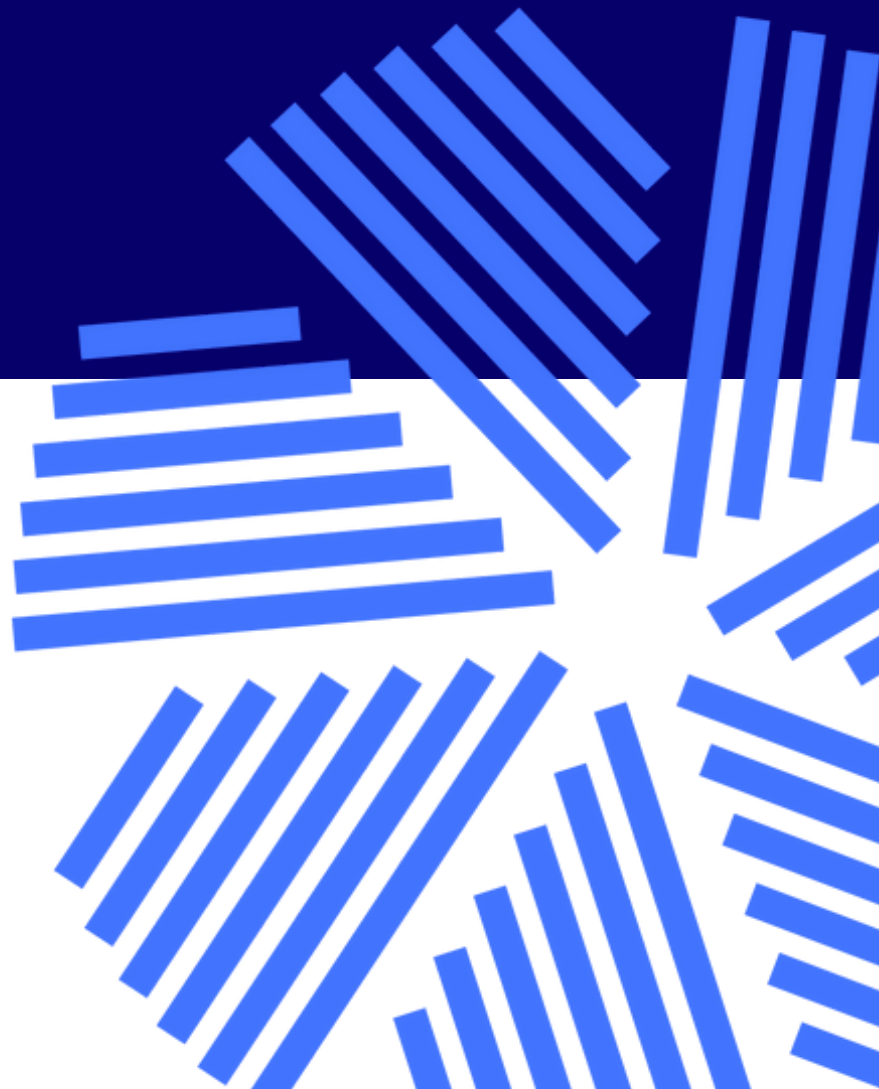
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# University College Partner Program *for Students*

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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 College Partner Program?

The University College Partner (UCP) 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. Through the program, you'll gain exposure to investment professionals who have earned their CFA charter, participate in student-focused educational programming, and connect with peers just like you.

You'll also benefit from unparalleled mentorship to help guide your journey toward registering for the CFA Exam. And joining just got easier - if your school is a participating partner, you can skip the two required sponsor forms, making membership faster and simpler so you can focus on your career journey.

## Membership Made Easy for Students

### **Built-in Support — No Sponsor Needed**

*As a UCP student member, your institution provides your application sponsor. That means you don't need to track down a CFA member or professor to apply - it's already taken care of.*

### **Simple Application Process**

*Just complete the online application and submit your resume. Once approved, you're in.*

### **Completely Free**

*Student Membership through UCP is 100% complimentary while you're eligible.*

# How Students Become Eligible

## **Undergraduate Students**

*Enrolled in finance, economics, business, or related programs at a participating UCP school*

## **Graduate Students**

*Enrolled in finance, economics, business, or related programs at a participating UCP school*

## **Enrollment Status**

*Must be currently enrolled at a University or College in the New England area and be in good standing with your school*

# 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

# All Access Member Benefits You'll Receive:

## **Mentorship Opportunities**

*Get matched with experienced mentors through our Mentor Match Program.*

## **Members-Only Online Community - Connect**

*Join a student-specific discussion forum, connect with peers, and build your professional presence.*

## **Career-Focused Events & Webinars**

*Learn from finance professionals, explore technical topics, and gain insight aimed at students into the CFA Program.*

## **Career Center Access**

*Browse internships and entry-level finance jobs posted exclusively for CFA Society Boston members.*

## **Exclusive Volunteer & Leadership Roles**

*Get involved with committees, task forces, and the Emerging Leaders Committee.*

## **Event Recording Library**

*Explore recorded webinars, speaker events, and content relevant to your studies all from the CFA Society Boston Connect Mobile App.*



# New for Student Members!

## The CFA Society Boston Connect Mobile App

Sign up for educational sessions, join communities, and easily submit for volunteering opportunities, all right from your phone.



From Classroom to Career – We’ve Got You.

Scan to apply and start building your future with CFA Society Boston.

