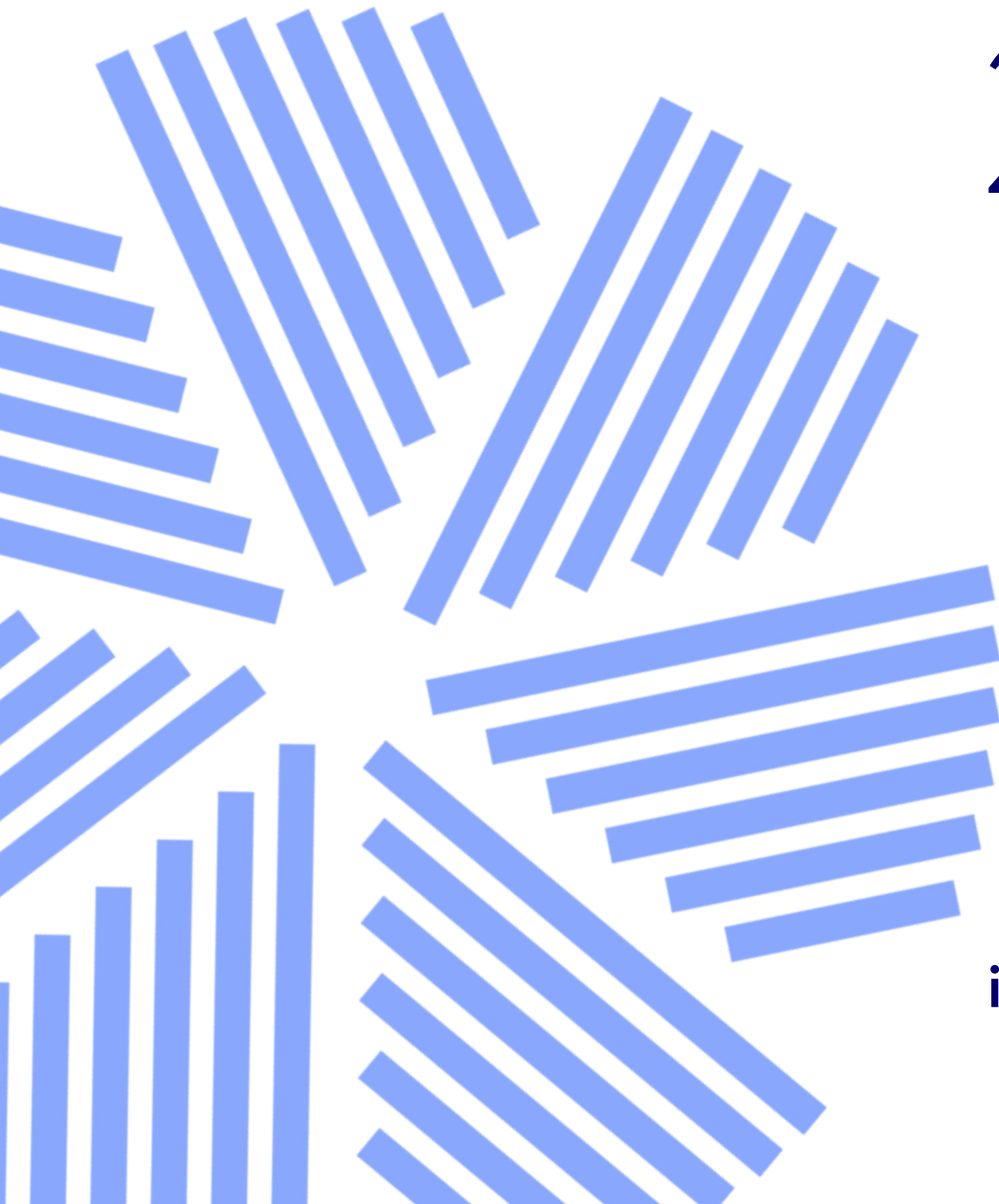




**CFA Society
Boston**

ANNUAL REPORT 2024



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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 160 local societies. CFA Society Boston is the 5th largest CFA Society in the world.

Year in Review

CFA SOCIETY BOSTON



MEMBERSHIP

- 6100+ members
- 96% Charterholders
- Over 650 Firms Represented
- 3,297 Candidates in the Greater Boston Area

ENGAGEMENT

- 154 Active Volunteers
- 10 Mentor Match Pairings
- 9 Research Challenge Teams
- 7 Participants in the CFA Society Boston University-College Partner Program



COMMUNITY IMPACT

- 39% of all CFA Institute DEI Code (US & Canada) Signatories are represented in Boston
- 11 Undergraduate Women in Investment Management Internships Offered
- 5 CFA® Level I Scholarships Awarded
- 21 Students Participated in the UNCF Lighted Pathway Program
- 21 Financial Literacy Alliances Served
- 700+ community members educated through the CFA Society Boston Financial Literacy Initiative



The remarkable commitment and efforts of the members of CFA Society Boston are the driving force behind our achievements. We extend our gratitude to all those who have diligently contributed throughout the year, ensuring the resounding success of the society's initiatives.

2023-2024 Member-Year Programs and Events

CFA Society Boston takes great pride in providing many opportunities for our esteemed members to cultivate and refine their expertise continually. Members are encouraged to engage in professional programs while spanning live and virtual sessions and fostering community growth through diverse networking avenues.



LIVE EDUCATIONAL PROGRAMS

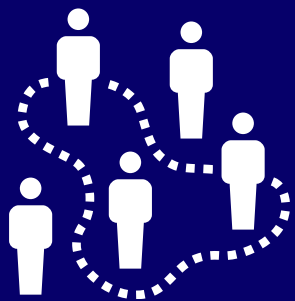
16 In-person educational programs on various topics such as Alternative Investments, Candidate Education, Sustainable Investing & many more.

648 Attended a live educational program or conference.

VIRTUAL EDUCATIONAL PROGRAMS

17 Virtual educational programs were offered including webinars, interactive Career Chats, and online courses focusing on Career Development, Economics, and Quantitative Methods.

307 Participated in virtual educational offerings.



HYBRID PROGRAMS

10 Hybrid programs were offered and included various topics including Performance, Measurement & Evaluation & Career Development.

215 Participated in hybrid programs.

NETWORKING OPPORTUNITIES

9 In-person events including the Annual Market Dinner, Annual Meeting, Charterholder Ceremony, and Networking Receptions.

432 CFA Society Boston members and guests attended networking events.

520 Members and guests attended the 38th Annual Market Dinner at the Omni Boston Hotel at the Seaport.



ENGAGEMENT OPPORTUNITIES

28 In-person engagement events including Member Appreciation Week, Lunch & Learns, and Coffee Connections.

636 CFA Society Boston members participated in engagement events and opportunities.

