



Candidate Membership

with CFA Society Boston



CFA Society
Boston

WHO WE ARE

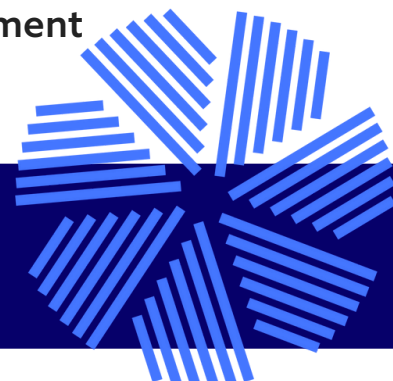
CFA Society Boston is a non-profit professional society that has been a point of connection for the Boston investment community since 1946. The Society provides an open forum for the exchange of fresh perspectives on industry issues and promotes ethics and integrity. Originally called the Boston Security Analysts Society, Inc. (BSAS), the Society changed its name to CFA Society Boston, Inc. in 2017.

CFA Society Boston is New England's largest membership organization for investment professionals with over 6,000 members. The membership represents over 650 investment firms and 96 percent of CFA Society Boston members hold the Chartered Financial Analyst designation from CFA Institute. To achieve this designation, members are required to pass a series of three intensive exams that equip financial professionals with superior analytical skills, real-world portfolio management experience, and high ethical standards.

CFA Society Boston is a founding society of CFA Institute, the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion for ethical behavior in investment markets and a respected source of knowledge in the global financial community. The end goal: to create an environment where investors' interests come first, markets function at their best, and economies grow. There are more than 180,000 CFA® charterholders worldwide in more than 160 markets. CFA Institute has nine offices worldwide and there are 160 local societies..

MISSION OF CFA SOCIETY BOSTON

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.



**ARE YOU REGISTERED
FOR A CFA EXAM?
BECOME A
CANDIDATE MEMBER
OF CFA SOCIETY
BOSTON!**

Candidate Membership
is complimentary for each year
you remain eligible.



**CFA Society
Boston**

**CANDIDATE
MEMBERSHIP**
WITH CFA SOCIETY BOSTON

**REQUIREMENTS
INCLUDE:**

- Currently enrolled for the CFA Exam for Level I, II or III. Please fill in your CFA Institute ID# to confirm enrollment in the CFA Exam.
- Complete the Candidate Membership Application and submit with your current resume
- Ask your supervisor; a Regular member of CFA Institute; or a regular member of CFA Society Boston to submit a signed Sponsorship Form

SPONSOR FORMS:

Applicants for Candidate Membership must be sponsored by:

- One Regular CFA Institute member of the Corporation OR
- One CFA Society Boston Member OR
- Work Supervisor

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Become an involved expert within
the investment industry as a
member of CFA Society Boston

Candidate Member Benefits

Connect: Building networks and connecting with other candidates and investment industry professionals is essential to our members, and this online community platform allows members to do so virtually.

Education and Networking Opportunities: Discounted registration for virtual and in-person programming.

Community Discussion: Connect allows members to join communities to have open dialogue on topics of interest. We have newly added Candidate Levels 1, 2 and 3 specific communities that you will automatically join based on your level.

Mentor Match Program: The new Mentor Match Program leverages the vast experience of the CFA Society Boston membership to promote skills development, leadership, and professional growth through the exchange of ideas and sharing of information between the Mentor and Mentee. Candidate members of the society are eligible to enroll in the mentorship program.

Volunteer Opportunities: Members in good standing can volunteer for committees, task forces, micro opportunities and quick tasks. Of special interest to our Candidate members, you can join the Young Leaders Committee and volunteer for many of our micro opportunities and quick tasks.

On-Demand Content: Watch recorded CFA Society Boston educational programming any time.

Digital Directory: Access to the Boston members is just a click away.

Blog: Any member in good standing can post to the CFA Society Boston Blog.



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Questions? Contact us.

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