



University College Partner Program

for student membership



CFA Society
Boston

WHO WE ARE

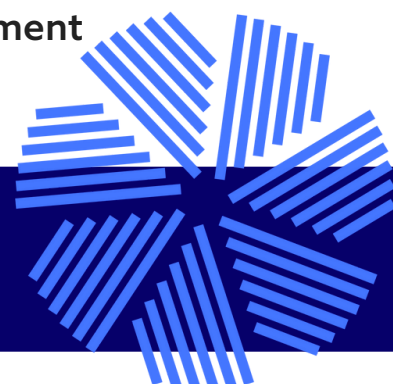
CFA Society Boston is a non-profit professional society that has been a point of connection for the Boston investment community since 1946. The Society provides an open forum for the exchange of fresh perspectives on industry issues and promotes ethics and integrity. Originally called the Boston Security 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..

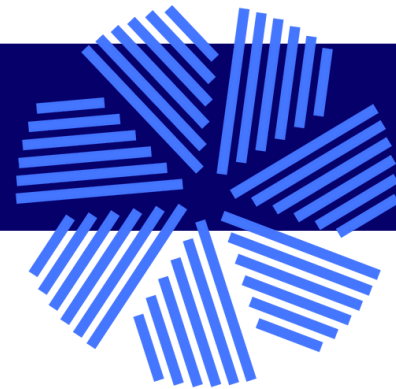
MISSION OF CFA SOCIETY BOSTON

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.



STUDENT MEMBERSHIP

HOW TO GET INVOLVED



ADVOCACY

- Financial Literacy Initiative
- Diversity, Equity, & Inclusion Code for the Investment Profession (USA & Canada)
- Women in Investment Management Network

MENTOR MATCH PROGRAM

- Unique online networking and career development tool
- Mentor Match Profile Access
- Mentee/Mentor Guides & Resources
- Networking Opportunities

VOLUNTEER OPPORTUNITIES

- Emerging Leaders Committee
- Sustainable Investing Task Force
- Ad-Hoc Task Force
- Micro-volunteer Opportunities

MEMBER COMMUNITIES

- Diversity, Equity & Inclusion
- ESG Certificate Study Group
- Fintech
- Global Markets and Macro
- CFA Candidate Study Groups (Levels I, II, III)
- Mentor Match Program & Alumni
- New Member
- Private Wealth and RIAs
- Project Exchange
- Quantitative Methods
- Student Members
- Sustainable Investing
- Young Leaders

BENEFITS

Career Resources
Networking
Program Discounts
Mentor Match Program
Volunteer Opportunities
Member Communities
Member Directory

CFA SOCIETY BOSTON UNIVERSITY COLLEGE PARTNER PROGRAM

The new CFA Society Boston University-College Partner Program allows students from higher education institutions across New England to join the society with ease. CFA Society Boston's Student membership engages a student earlier in the career path to advance their network and industry exposure. A University-College Partner allows verified students to bypass the required two Sponsor forms during the application process. Partnering with CFA Society Boston signals to your students and employers the importance of society membership and the many benefits to those students interested in the investment industry.

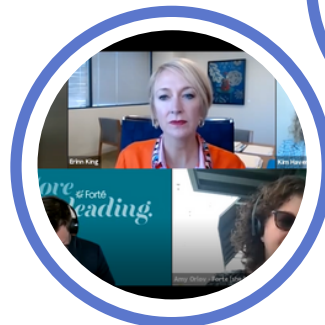
We are now accepting institution applications for the University-College Partner Program.

University-College Partners Requirements:

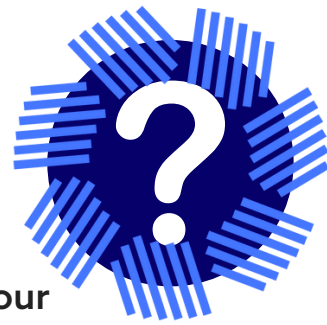
- must have a main campus in one of the five New England states
- offer courses related to the finance industry
- are responsible for verifying the student applicant status through a dedicated admin or Professor
- may not enforce membership as a student or course requirement

Learn more and apply today at

www.cfaboston.org/UniversityCollegePartnerProgram



STUDENT MEMBERSHIP FAQ



How do I apply for Student membership?

You must submit an online application with CFA Society Boston. If your institution is enrolled in the CFA Society Boston University-College Partner Program click [here](#) to apply. If your institution is not enrolled in the partner program click [here](#) to apply for Student Membership.

If a student signs up for the CFA® Exam during the student membership would they need to convert to the candidate membership?

We would encourage the student to apply for a candidate membership to receive the best outreach and candidate networking opportunities. It is not required to update membership until renewals (June 30), when a student would be redirected in the application process.

How much is Student Membership?

Student Membership is complimentary for each year you remain eligible.

How long can I remain a Student Member?

Student Membership cannot extend for a period that exceeds four fiscal years or any part thereof and Student Membership is available only to individuals who do not otherwise qualify for Affiliate or Regular membership.

UNIVERSITY COLLEGE PARTNER PROGRAM FAQ

Is there a fee to participate in the University-College Partner Program?

There is no fee for an institution to participate in the CFA Society Boston University-Partner Program.

If a university or college's one year program dates does not align with the member year (July 1 – June 30) will a student be able to renew with a student membership the following year?

A student must verify upcoming courses in our new member year to remain eligible during the renewal process (May – July). If a student renews before the end of their upcoming courses (post June 30) they can re-apply as students. A student will lapse by not renewing (after August 31st) and will need to reapply. If a student takes a leave of absence during the academic year we will review the extenuating circumstances on a case by case basis.



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Boston

Questions? Contact us.

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