



### **PROPOSED MISSION STATEMENT:**

(Approved at June 2020 Board Meeting)

To lead the investment management and financial services professions by promoting the highest standards of ethics, continuing education, and professional excellence for the ultimate benefit of society.

### **CURRENT MISSION STATEMENT:**

(Approved at Jan. 2013 Board Meeting)

To lead the investment profession by promoting the highest standards of ethics, education, and professional excellence; to shape an investment industry that serves the greater good; and to serve as the premier local resource for Chartered Financial Analyst designees, candidates, other investment professionals and our communities.

CFA Society Chicago, the world's first investment analysts' society, is committed to working with our members and the investment community to achieve our mission through five organizational pillars:

- Ethical Leadership - Championing ethical behavior in investment markets.
- Community - Fostering a culture of inclusion, diversity and respect.
- Industry Knowledge - Being a respected source of knowledge in investment markets.
- Professional Excellence - Raising standards of professional excellence in the industry.
- The Greater Good - Expanding our investment culture to serve the interests of investors and society.

### **PROPOSED VISION STATEMENT:**

(Approved at June 2020 Board Meeting)

To be the premier resource for our members and the greater investment management and financial service professions in Illinois and certain surrounding states. CFA Society Chicago serves all financial professionals seeking investment management-related education, knowledge, professional development, connection, or inspiration. We ultimately seek to achieve superior outcomes for our clients including institutional and retail investors, which advances our social mission and benefits our members through greater demand for competent and ethical investment management professionals.

### **CURRENT VISION STATEMENT:**

(Approved at September 2004 Board Meeting)

As the world's first investment analysts' society, CFA Society Chicago strives to be the pre-eminent association of Chartered Financial Analysts and other investment professionals. CFA Society Chicago has long collaborated closely with allied groups linked by CFA Institute (formerly AIMR).

CFA Society Chicago effectively, and with fiscal discipline, delivers quality programs and services fostering the development and application of technical skills and ethical practices within the profession and by the individual practitioner. CFA Society Chicago enables its members to serve as mutual sources of support directed at their attainment of the highest professional standards.

The talent and integrity of CFA Society Chicago's members are recognized throughout the investment community. Their expertise and dedication are sought by both institutional and individual investors across the full range of economic and financial issues.