

Destination 2027

2024-2027 STRATEGIC PLAN



OUR RAISON D'ÊTRE REMAINS INTACT

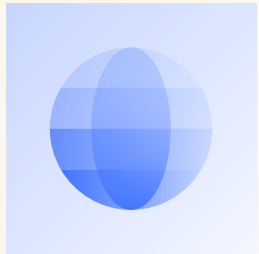
CFA Montréal has established its stature as a unique organisation with impartial interests, playing a crucial role in advancing investment management professionalism in Quebec. This distinction stems from its access to professionals holding the most sought-after technical and ethical skills operating across all spheres of the investment industry, as well as access to high-quality global-scale resources provided by CFA Institute and other CFA Societies. These assets improve our industry, and therefore in turn, the overall Québec society.

OUR STRATEGY IS EVOLVING

The Board of Directors has taken its inspiration from the four CFA Institute Strategic Pillars to establish CFA Montréal's Strategic Objectives for 2024-2027. The "DESTINATION 2027" plan personalises these strategic objectives by establishing specific targets and key results to meet the Montréal Market's needs.

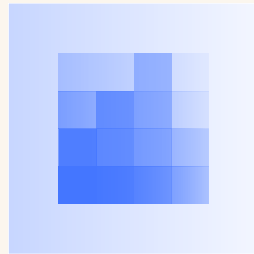
The actions under each strategic objective for the next three years aim to strengthen ties with communities and stakeholders, increase our visibility among members and partners, and enhance the candidate pipeline to ensure the sustainability and diversity of a strong ecosystem.

These four objectives are:



SHAPING THE FUTURE OF THE INDUSTRY AND PROFESSION

Our impact on various stakeholders is significant, and the adoption of codes/standards is constantly growing. To reach this destination, we collaborate effectively with CFA Institute and CFA Societies Canada. We will participate in the development of a concerted national strategy, adopted by all Canadian societies, where CFA Montréal will be recognised as a leader and an influential voice within its community.



OFFERING AND PROMOTING A DIVERSE PORTFOLIO OF LEARNING PRODUCTS

By emphasising the CFA designation, CFA Montreal is designated as "THE" essential reference in terms of professional development for the finance and investment industry in Montreal. It has established itself as the leading creator and disseminator of original and useful content, becoming an essential one-stop-shop for members.



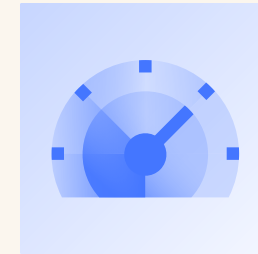
BUILDING COMMUNITY AND PROVIDING MEMBER VALUE

Position CFA Montreal as the pivot of the Québec financial industry in order to increase the value of the CFA designation through increased visibility:

Current members : continue to promote the educational value of CFA Montréal by highlighting available designations and certifications.

Partners and collaborators : be considered one of the pillars of the financial industry in Québec.

Future members : promote the investment management profession and its available career paths at all stages of the academic journey.



ENSURING EXCELLENCE IN SOCIETY GOVERNANCE AND OPERATIONS

Continue to be recognised as a leading example of governance excellence within the CFA Institute ecosystem, and reach a structural level that gives us autonomy and efficiency, thus guaranteeing the continuity of operations and the sustainability of the association.

About CFA Montréal

MISSION

To contribute to our members' skill development and career progression by promoting their expertise, the CFA® designation, and our values centered around ethics and professional excellence.

VISION

Be recognised for the expertise and influence of our members in the Montréal financial ecosystem and represent a community of professionals deeply committed to their association.

VALUES

In addition to the values of ethics and professional excellence linked to the CFA designation, CFA Montréal has adopted complementary values:

Respect

Collaboration

Audacity

Integrity

Collegiality

Humility