

# 2021-2024 STRATEGIC PLANNING



## PURPOSE

**To stay relevant to our members and the investment industry.**

## CFA MONTRÉAL'S MISSION

### CFA Montréal's mission

- Help members develop their competencies and advance their careers.
- Promote members' expertise, raise the profile of the CFA designation and champion the highest standards of ethics and professional excellence.

### How we fulfill our mission

- By taking a proactive approach to innovation in the investment industry.
- By providing a professional learning program based on competencies, career development and continuing education program.
- By hosting premium-quality discussion forums.

## CFA MONTRÉAL'S NEW VISION

### Vision of CFA Montréal

- Members actively engaged in their association.
- An organization recognized for the expertise and influence of its members within Montreal's financial ecosystem.

## CFA MONTRÉAL'S COMPLEMENTARY VALUES

Over and above the **standards of ethics** and **professional excellence** that are an innate part of the CFA® designation, CFA Montréal embraces the following **complementary values** within the organization:

### RESPECT

We are considerate, courteous and respectful in everything we do and say.

### AUDACITY

We act with conviction and encourage a spirit of innovation.

### COLLEGIALITY

We favour conversations that reflect and celebrate diversity in terms of our members' competencies, opinions and expertise.

### COLLABORATION

We value every individual's involvement in and contribution to the development and growth of our organization.

### INTEGRITY

We engage in practices and behaviours that inspire trust, adhere to established rules and uphold ethical and moral principles.

### HUMILITY

We are committed to improving our practices at every opportunity.

## STRATEGIC DIRECTIONS AND OBJECTIVES

### ENSURE THE LONG-TERM FINANCIAL HEALTH OF CFA MONTRÉAL

- Diversify and optimize revenue streams.
- Reduce outsourcing costs.

### ORCHESTRATE OUR ORGANIZATIONAL TRANSITION WITHOUT LOSING SIGHT OF OUR CORE VALUES

- Become a first-choice employer.
- Implement and adapt to an operational framework.
- Continue moving toward a strategic governance model.

### SUPPORT AND DEVELOP THE COMMITMENT OF OUR MEMBERS AND CANDIDATES TOWARD THEIR ASSOCIATION

- Enhance and diversify the services provided to members and candidates, by continuing to develop activities focusing on **ongoing information**, **competency development** and **career assistance** and building a **continuous education** offering.
- Tailor messages to help foster a culture of engagement.

### ELEVATE THE ASSOCIATION'S STANDING WITHIN THE MONTRÉAL FINANCIAL ECOSYSTEM

- Promote the CFA designation and the core values it represents.
- Showcase to innovations, trends and developments that impact the investment industry, including:
  - **Diversity** within the investment community;
  - Integration of technology (**Fintech**) and **ESG** factors into the investment process.

