

RECOGNITION OF CFA MONTREAL LEADERSHIP

CFA MONTREAL WINS CFA INSTITUTE'S SOCIETY EXCELLENCE AWARD

SOCIETY EXCELLENCE AWARD – Most outstanding by size : more than 2,000 members

VOLUNTEER OF THE YEAR AWARD – Americas presented to Sophie Palmer, CFA

CFA Montreal President

RESEARCH FOUNDATION SOCIETY AWARD – Content

ENHANCE PROFESSIONALISM & PROFESSIONAL RECOGNITION AWARD

awarded to all 12 Canadian CFA Societies



CFA Montreal distinguished itself among the world's 149 CFA Societies at the recent 2017 CFA Institute awards ceremony, held in Philadelphia from May 21 to 24. The Society received three awards, including Most Outstanding Society by Size – More than 2,000 Members.

This prestigious award recognizes the exceptional achievements of a local society and its commitment to the strategic initiatives of the CFA Institute. It underscores the efforts the society has made to advocate for professional excellence through the improvement of investor protection, market fairness, ethics and investor outcomes.

CFA Montreal is also very proud to announce it received two additional awards, a further testament to

This year, CFA Institute Excellence Awards received 132 nominations in 14 different categories, representing 51 societies in all.

the engagement and dynamism of its volunteers:

- Sophie Palmer, CFA, President of CFA Montreal, was named **Volunteer of the Year for the Americas**.
- The **Research Foundation Award** was presented to CFA Montreal in the Content category for its contribution to financial literacy through the co-authored brief Portfolio Structuring and the Value of Forecasting, edited by Jacques Lussier, PhD, CFA.

FITTING RECOGNITION OF VOLUNTEER MEMBERS



“The CFA Institute is grateful for the thousands of CFA charterholders who generously volunteer their time and skills and, in turn, help create a better member organization that benefits the investment

profession at a local, regional and global level,” noted Emily Dunbar, Head of the Global Society Relations for the CFA Institute.

“We are honoured to receive these awards and the recognition for our hard work this past year,” said Sophie Palmer, CFA, President of CFA Montreal. “As a member society of the CFA Institute, we are dedicated to help build the next generation of investment professionals, serve our members, and promote the highest standards of ethics and education to maintain professional excellence in our industry. We are proud of the recognition shown by the CFA Institute for our commitment to supporting the organization’s mission.”

We wish to take this opportunity to thank our members and the some 50 volunteers who help guide our projects year-round. Because of all of you, not only have we formed a strong community of

professionals at the leading edge of the finance industry, we have made CFA Montreal the 10th largest society in the world!

CFA Montreal is an invitation to always do better. For the clients who put their trust in us. For organizations. For the economy. For society.

The Society has helped make Montreal a respected financial centre long recognized world-wide for its vitality. If the Society’s leadership has also earned respect and recognition, it is due to the dynamism and openness of all of our members and their dedication to the profession.

We congratulate and sincerely thank everyone who has contributed directly or indirectly to this impressive achievement.