



Strategic Plan 2025 – 2028

Approved by the Board of Directors

January 2025

Executive Summary

As the Board of Directors came together to refresh CFA Society New York's (CFANY) strategic plan, we recognized the need and the opportunity to re-invest in the people and programs that define how CFANY creates value for the investment management and financial services communities.

CFANY has always been a member-driven organization. The energy, insights and commitment of our volunteer leaders and members guided us through the challenges of the COVID pandemic. As we look ahead, we have the opportunity to build on our current strong community engagement, stable member retention and solid fiscal foundations.

Realizing that opportunity will require change. Change in how we engage and support the member volunteers who help us to produce industry leading content and events. Change in how we more intentionally engage the New York area employers who represent the greatest concentrations of CFA Charterholders. Change in how we engage the educational institutions from which the next generations of Charterholders will emerge. And change in our expectations for how the Board of Directors works through and with CFANY Committees, Interest Groups and the staff team to guide the organization.

The direction reflected in our strategic pillars provides us both focus for effecting those changes and flexibility to learn and adapt how we optimize value for CFANY members and, ultimately, the larger financial services community. We remain committed to our duties of care, loyalty and obedience and to the long-term viability of our Society. We approach the next three years with great optimism for delivering on the value envisioned in this strategic plan.

*CFA Society New York Board of Directors
January 2025*

Mission, Vision and Values

MISSION

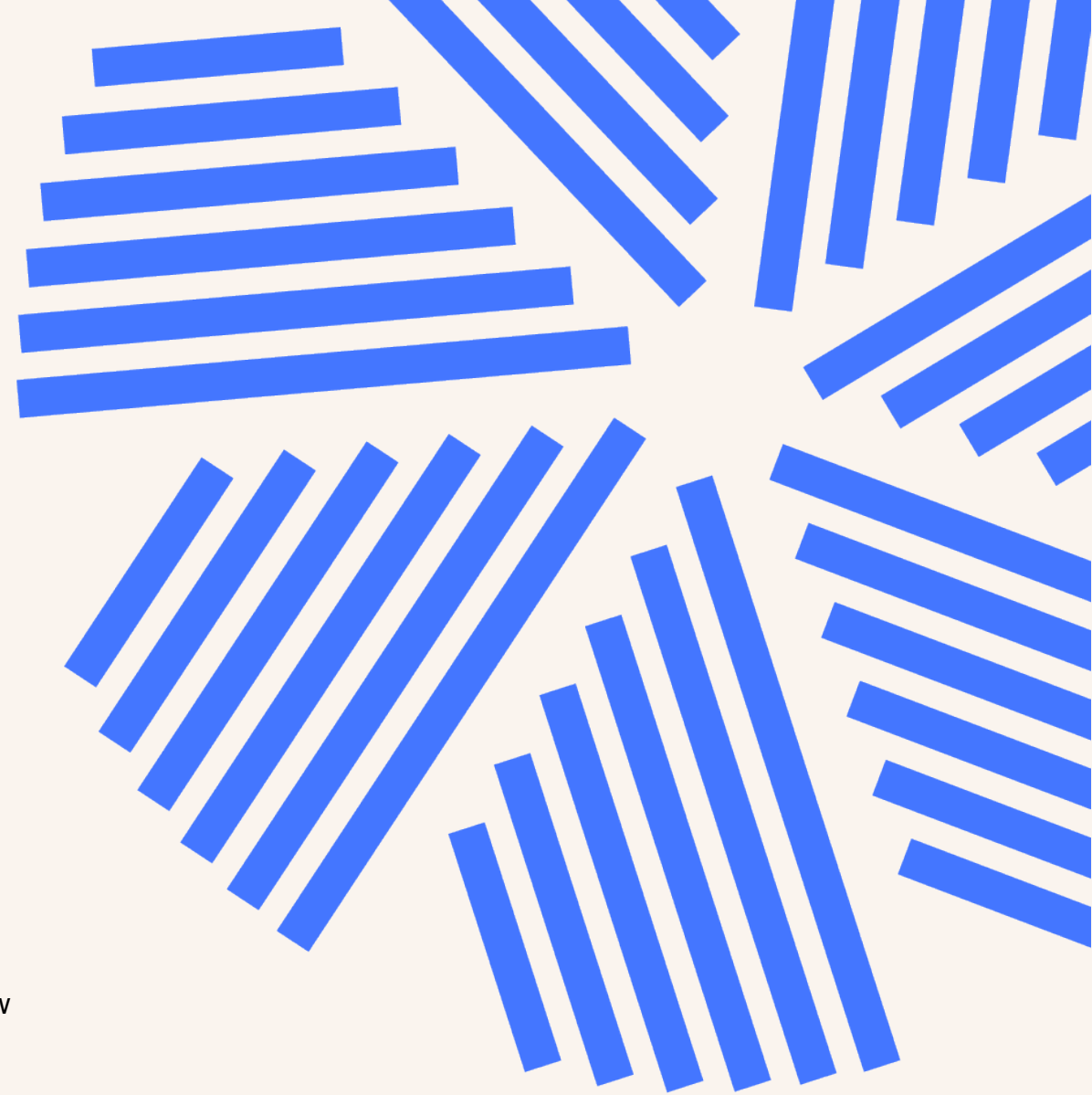
To support the professional growth of our members by serving as a premier forum for education, the exchange of ideas, the development of relationships, and the promotion of ethics and standards within the investment management and financial services communities.

VISION

For investment and finance professionals to achieve excellence in practice through the standards and ideals represented in the CFA Charter, and to have this excellence elevate trust in the professional community they represent.

VALUES

- Integrity** We hold ourselves – our Board, our volunteer leaders, our members and our staff – accountable for operating ethically, honestly and with transparency.
- Leadership** We draw on the opportunities inherent in the New York market to identify and promote the exchange of innovative ideas and leading practices.
- Inclusion** We embrace diversity of background, identity, thinking and professional focus as strengths, and we foster equitable opportunities for members to grow professionally through Society programs.
- Partnership** We amplify the value of our work by collaborating with CFA Institute, fellow CFA Societies, leading industry firms, educational institutions and other organizations relevant to our Mission.
- Service** We are at our best when members and staff contribute their time and expertise in support of our mission and our community.



Strategic Pillars

At the heart of CFA Society New York’s strategic plan is a focus on value for our membership community and for the broader investment management and finance communities. We are committed to continually learning from and responding to the evolving needs of those communities.

01 Excellence in Governance and Operations

Delivering value to our members and to the investment management and finance communities requires greater collaboration, communication and transparency across CFANY’s Board of Directors, volunteer leaders and the Society’s staff team. We are committed to putting the right structures, processes and expectations in place to enable us to work effectively in support of our mission and members.

03 Member Value Across Career Stages

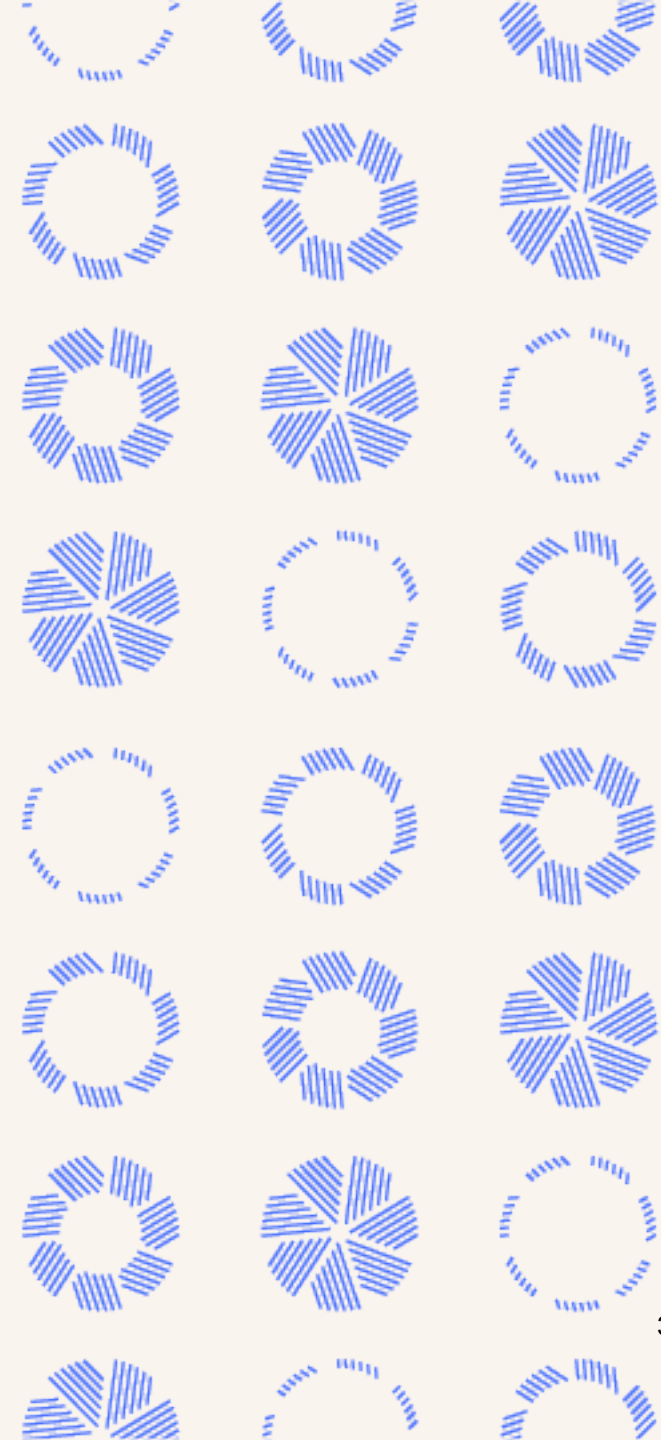
Our members are at the heart of CFANY’s reason for being, and an active, successful member base allows us to create broader industry value. We remain committed to connecting CFANY members at all stages of their careers with programs focused on their professional growth. We want the connections members make through educational programming, mentoring and peer-to-peer engagement to enhance the value they feel as part of our Society.

02 Industry Leading Content

Relevant, high-quality content is the cornerstone of CFANY’s value. We must stay in step with the changing business landscape and technology innovations which impact our members. Our focus is for CFANY events and programming to remain critical platforms for thought-leadership, the exchange of ideas, and the development of meaningful professional connections and relationships.

04 Leadership with Relevant Institutions

CFANY’s leadership role within the New York market is enhanced by partnerships within a global ecosystem of relevant institutions. We strengthen that ecosystem and the value it provides to our members by proactively engaging CFA Institute and fellow CFA Societies; industry firms and educational institutions; and other partner organizations.





**CFA Society
New York**

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