



2020 – 2022 Strategic Plan

Overview

The CFAW Board of Directors, as representatives of its members, has the responsibility to set a clear direction for the future of the organization, establish necessary policies, practices, and priorities that help achieve this desired future, and hold CFAW accountable for annual performance. The CEO, staff and CFAW committees are responsible for the implementation of the Strategic Plan.

This plan is the result of the CFAW Board of Directors strategic planning meeting in August 2020. The CFAW Board of Directors review this plan annually and measure the society's performance against these strategic goals.

Mission Statement

To advance members' professional success and facilitate a vibrant, engaged community.

Strategic Goals

- **Enhance Member Value**
CFAW seeks to enhance the value of membership through its efforts to raise brand awareness of all member benefits and society resources, increase the member value proposition, establish a mentoring program, and enhance educational programming to grow member engagement in programs among all members.
- **Improve CFAW Financial Stability**
CFAW is committed to being financially stable and good stewards of members' resources. To accomplish these goals, the society strives to increase overall membership, ensure education programming is profitable overall, and grow corporate sponsorship revenue.
- **Increase External Outreach**
CFAW aspires to raise external awareness of the Society and the CFA Charter, in addition to increasing financial literacy in the Washington, DC area. More specifically, the Society plans to enhance its outreach to students, employers and the community at large by increasing its advocacy engagement to these groups.

Vision

- To be the primary authority and respected thought leader in the DC community on all issues related to investments, global financial matters, and ethical standards in the industry.
- To have members across all demographics and industries engaged and participating actively in Society activities and sharing their time and expertise in support of the organization's mission, goals, and objectives.
- To provide meaningful opportunities to members for education, development of substantive professional relationships and dialogue.
- To have the value of the CFA charter known by employers, investors, and the local community.
- To operate as a premier membership association and as a prudent steward of society resources.

Values

- *Ethics and Integrity* - CFAW is guided by a Code of Ethics and Standards of Professional Conduct that are the ethical benchmark for investment professionals. We will act with integrity, competence, diligence, respect and in an ethical manner with one another, our members and the public.
- *Knowledge* - CFAW and its members share a commitment to maintaining and improving our professional competence and that of other investment professionals. We facilitate the exchange of ideas between our members and our community in order to enhance interaction and understanding of the CFA Charter.
- *Teamwork* - CFAW creates a collegial environment built on its reputation for trust, inclusion and networking. The Board and membership work together toward involvement and participation at all levels of the organization while keeping members updated and informed on practices and issues that affect the profession.
- *Community* – CFAW believes in a diverse and engaged community that values the contributions of all members. We foster an open, collaborative, and intellectually stimulating environment for member development and connection.