

CFA Society Australia launched to deliver stronger voice for members

[SYDNEY, AUSTRALIA] 14/15 May 2024: CFA Society Australia has been launched following the amalgamation of three local CFA Societies, giving a stronger voice to Australian CFA charterholders and raising the recognition of the CFA credential in Australia.

CFA Society Australia launched the new brand in Brisbane last week in an event for member and candidates, and at further events in Melbourne on 16 May and on 23 May in Sydney, followed by a Perth celebration on 30 May.

Lisa Carroll, CEO of CFA Society Australia said the transition to the CFA Society Australia from CFA Society Sydney, CFA Society Melbourne and CFA Society Perth, will bring together over 3,500 investment professionals under one community and giving them one combined influential voice.

“We are uniting over 3,500 CFA charterholders across Australia and 5,000 CFA Program candidates under one brand, CFA Society Australia, making us one of the largest professional societies in the Asia Pacific region. This is a powerful step towards empowering our members who are committed to the highest standards of professionalism in the Australian investment industry,” said Ms Carroll.

“Importantly, speaking with one voice will raise recognition of the CFA designation and strengthen the professional standing of our members, which will likely translate into a positive impact on members’ career advancement and opportunities,” she said.

“Our members will benefit from a more extensive network nationally and globally. At the same time, we are better positioned to enhance the efficiency of delivering member services across Australia, while retaining the community spirit in each of our chapters in Brisbane, Melbourne, Perth and Sydney,” Ms Carroll said.

Michael Clancy, Chair, CFA Society Australia Board and CEO of Qantas Super, said the transition to CFA Society Australia presents a significant opportunity to strengthen and grow the investment profession in Australia by promoting the highest standards of ethics, education and professional excellence.

“The change will enable us to engage with employers, government and regulators nationally, while continuing to provide member services which are tailored to each geography we serve,” Mr Clancy said.



Margaret Franklin, CFA President and CEO of CFA Institute, said the new organisation will create a stronger and more influential organisation and more efficient society that will better serve CFA charterholders and the public interest. “CFA Society Australia can more effectively create thought leadership, support the growth and reputation of the CFA charter and forge institutional partnerships with far reaching benefits. The organisation can also influence policy markets, promote the adoption of industry standards and share regional and global content for the benefit of its members,” said Ms Franklin.

“The societies in Australia have long served as distinct influential groups that drove innovation for investment professionals of their respective regions. Collectively, the future possibilities will be even greater. We look forward to working closely with the new board and staff of CFA Society Australia, which will advance our mission of leading the investment profession globally in ethics, education and professional excellence for the ultimate benefit of society. Together we are building a more resilient, diverse, influential and sustainable investment profession that serves the greater good.”

CFA Institute will continue to deepen its engagement with Australia, giving Australia a stronger voice in the global community. Australia has become one of CFA Institute’s ten priority ‘Global Financial Centre’ markets. “As one of ten priority markets, this will help sustain higher levels of member services and the opportunity to provide input to CFA Institute’s strategic priorities and programs,” Ms Carroll said.

Media Contact

Nicki Bourlioufas

Telephone: +61 786 933

nicki@spotoncpr.com

About CFA Society Australia

CFA Society Australia is part of the worldwide network of CFA Institute member societies that lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. CFA Society Australia represents the interests of over 3500 investment professionals through advocacy, education, events, and professional development. For more information visit www.cfas.org.au, or follow us on [LinkedIn](#) or [Facebook](#).

About CFA Institute

As the global association of investment professionals, CFA Institute sets the standard for professional excellence and credentials. We champion ethical behaviour in investment markets and serve as the leading source of learning and research for the investment industry. We believe in fostering an environment where investors’ interests come first, markets function at their best, and economies grow. Spanning nearly 200,000 charterholders worldwide across 160 markets, CFA Institute has 10 offices and 160 local societies. Find us at www.cfainstitute.org or follow us on LinkedIn and X at @CFAInstitute.