



*“Every client
is different, every
client is unique...
I can’t stress enough
the need for
understanding,
compassion,
listening.”*

— Anna Nemeth, CFA

Financial advisers with CFA on their business cards have diligently pursued an ethical and demanding path. They have mastered a body of knowledge evidenced by passing eighteen hours of rigorous examination and make an annual commitment to uphold and abide by a professional code of conduct. As you review your financial affairs, find out more about CFA charterholders and the standards they uphold at CFAINSTITUTE.org/adviser

**ETHICS
TENACITY
RIGOR
ANALYTICS**

**CFA
INSTITUTE**

NEVER PROMISE MORE THAN CAN BE ACCOMPLISHED.

A financial adviser who is a CFA charterholder is uniquely qualified to manage clients' interests in a marketplace too eager for quick solutions. In the end, it is the ability to bring integrity to the process and make disciplined decisions, not unrealistic promises, that leads to successful outcomes.

To see if a CFA charterholder is right for you, and to find an adviser near you, please visit cfainstitute.org/adviser



**ETHICS
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ANALYTICS**

“We should be driven by ethics as principles, not rules to be exploited for what you can or cannot get away with.”

—Jean L.P. Brunel, CFA



Jean L.P. Brunel, CFA

A financial adviser who is a CFA charterholder has devoted years to intensive study, completed at least four years of relevant work experience, and passed three rigorous examinations. The designation represents a commitment to manage a client's interests with integrity, a willingness to set forth realistic expectations that are attainable, and a fundamental belief that principles are not a luxury. They are everything.

To learn more about the commitment, principles, and investment expertise a CFA charterholder possesses, visit us at cfainstitute.org/adviser.



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WHAT THE CFA DESIGNATION MEANS TO INVESTORS.

A financial adviser who is a CFA charterholder represents a tremendous reservoir of investment expertise, having demonstrated commitment to the highest standards of ethical and professional conduct, and comprehensive knowledge of investments and analytics.

To see if a CFA charterholder is right for you, and to find an adviser near you, please visit cfainstitute.org/adviser



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WHEN MANAGING YOUR WEALTH, PERSPECTIVE CAN MEAN EVERYTHING.

In today's complex global market, the ability of an adviser to see the larger picture, and understand its potential, can make a significant difference when it comes to investing wealth. It is this capability, to drill deeper and find real solutions, that sets CFA charterholders apart.

To explore the potential of wealth management in today's global marketplace, and learn more about the knowledge and background that make CFA charterholders unique, please visit us at cfainstitute.org/adviser



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IF THERE WERE EVER A TIME TO ASK QUESTIONS ABOUT MANAGING YOUR WEALTH, IT IS NOW.

At CFA Institute, we believe that a relationship between a client and a CFA charterholder adviser works when both sides ask the right questions. Through this rigorous process people become better informed, disciplined investment strategies are born, and expectations are more likely to be met.

To explore the potential of wealth management today, and the questions you should be asking, please visit us at cfainstitute.org/adviser



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