



Additional Educational Designations and Certification Guiding Principles

Adopted by the Board of Governors on 5 February 2010

New initiatives in designations and certifications should:

- Contribute to the return on mission by improving the value proposition to members and fit within the vision of CFA Institute.
- Leverage our skills, resources, and experiences in key competencies of financial education, such as development of curriculum and measurement of knowledge.
- Meet a critical need among a significant number of global investment industry participants.
- Be distinct from the CFA Program, with minimal overlap of curriculum, and avoid competing for candidates.
- Base any ethics related training on the CFA Institute Code and Standards.
- Be on a track to develop into a self-support business model that furthers the organization's goals for revenue diversification.