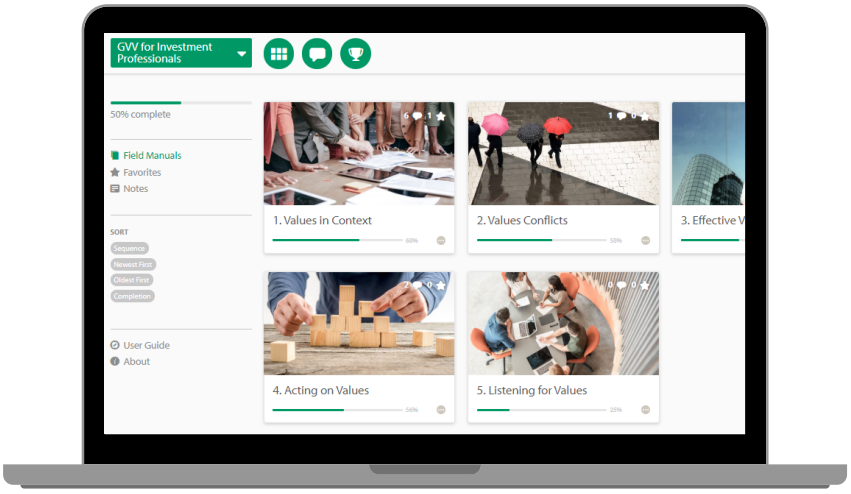
CFA Institute

ETHICS LEARNING LAB

GIVING VOICE TO VALUES
FOR INVESTMENT PROFESSIONALS

Giving Voice to Values (or GVV) for Investment Professionals provides practical strategies that will allow you to effectively act on your values in the face of workplace pressures to do the opposite. You may think you are powerless to effect change, but GVV gives you the skills and confidence to act on your values when you know what is right.



ABOUT THE COURSE & PROGRAM FORMAT

What do you do when confronted with these situations:

- Your supervisor asks you to push certain, more profitable investment products — "That's how we do it around here!"
- You are tempted to rely on false rationalizations — "This is how the world works!"
- A close colleague asks you to manipulate performance results — "Just this one time!"
- You think you don't have the seniority — "It's not my responsibility!" — authority — "My hands are tied!" — or ability — "I just want to get along!" — to speak up

Rather than focus on ethical analysis, GVV assumes you know the right course of action and want to follow an ethical course of action if there is a reasonable and realistic chance you will be successful. GVV gives you the tools to navigate conflicts and empowers you to act ethically in the face of pressure to do otherwise without risking your job.

Hosted in the CFA Institute Ethics Learning Lab, the GVV program is conducted entirely online. Over the course of a session, you will engage with fellow participants to work through five modules that take as little as 30 minutes each to complete and include principle, theory, and practice content as well as videos, quizzes, polls, and discussion prompts. Designed to mimic the interactions you would have with others in a classroom, you will explore the application of GVV with your fellow participants by sharing comments, voting for your favorite comments, and tracking your progress on the leaderboard. This social approach encourages interaction, making the experience more meaningful, memorable, and enjoyable.

OUTCOMES & IMPACT

Participants will

- learn and practice skills to successfully address ethical conflicts in their professional lives.
- implement creative problem-solving approaches to advance conduct in the workplace that is consistent with their values.
- identify what has enabled or disabled them from voicing their values effectively.
- assess and harness their individual strengths to act on their values.
- anticipate and prepare for rationalizations and challenges to their values.
- earn 4 hours of professional learning credit.

SOCIETY BENEFITS

The GVV Program will

- provide an interactive, engaging digital learning experience for your members.
- replicate in-person programming in a safe, virtual setting.
- deliver ethics content that is critical to the heart of the CFA Institute mission to advance
- ethics and education in the investment profession.
- allow your society to reach a widely dispersed membership who may not be able to attend an in-person event.
- enable society members to earn CE/SER credit.

SCHEDULE A SESSION FOR FREE

To schedule a private session for your society, email ethicstraining@cfainstitute.org.



"I am thrilled to be working with CFA Institute to customize the online GVV Program for those in the investment industry. Investment professionals who learn to effectively act on their values will be making a valuable contribution to restoring trust in the investment industry."

– Mary C. Gentile, PhD, Creator/Director of Giving Voice to Values and Professor of Practice at UVA Darden School of Business