

CFA Society Japan Strategic Plan

Nov 2025 – Oct 2028



About the Strategic Plan

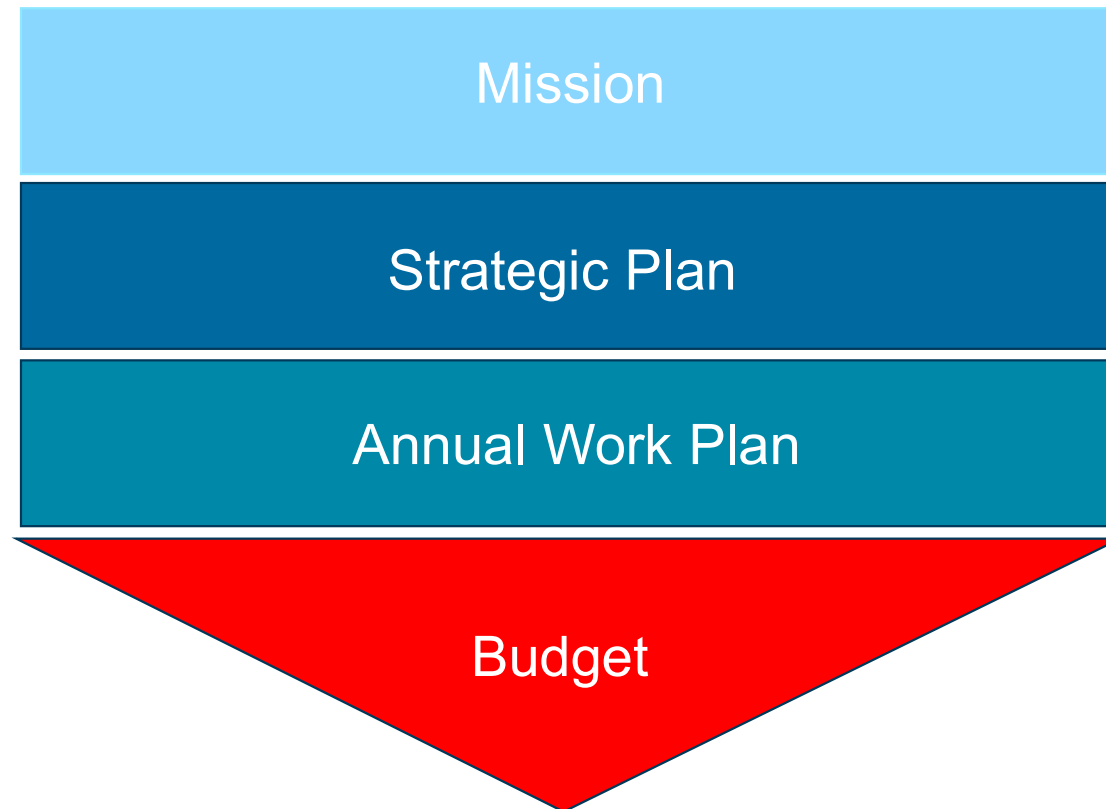


CFA Society Japan (CFAJ) identifies three key strategic goals for the next three years, based on members' feedback, market changes, and the Board discussions.

The three strategic goals to enhance contributions to its members and financial industry:

1. Increase the brand value of the CFA certification and social recognition
2. Strengthen engagement with members and sponsors and enhance value to the community
3. Establish a more efficient organizational management system

The Planning Cycle



Mission



CFA Society Japan's goal is to contribute to the mission of the CFA Institute.
CFA Society Japan represents the CFA Institute in Japan.

'To lead the investment profession in Japan by promoting the highest standards of ethics, education, and professional excellence to the ultimate benefit of society.'

Review of Previous Strategic Period (Nov 2021 – Oct 2024)



Item	22	23	24
【Membership】			
- Retention rate of existing regular members	91.3%	92.8%	92.3%
- Increase the number of CFAJ members (% to current members)	10%	4.5%	8%
- Organize studying events for candidates	14	20	15
- Organize career events	n/a	1	1
- Participation ratio of members who attend at least one society program a year	29.5%	40.3%	30.2%
- Frequency of the networking events in various forms a year (times)	3	8	9
- LinkedIn postings	98	92	101
【Employer Outreach】			
- Meetings with existing and prospective employers to update the recent activities of the society	n/a	n/a	14
【University】			
- Ratio of Research Challenge students who become candidates of the exams	8.3%	1.6%	3.7%
【Advocacy】			
- Conduct advocacy and ethics events	15	13	10
- meetings with authorities	n/a	n/a	4
【Program】			
- Continue to provide seminars, etc. bi-weekly as an average	41	50	41

Current situation and challenges



CFAJ recognizes following key challenges:

- ✓ **Low Brand Awareness:** The CFA charter remains insufficiently recognized within Japan market.
- ✓ **Limited Member Engagement:** We see low response rates to surveys and limited member interest.
- ✓ **Succession Planning:** Developing the next generation of leaders, especially for the Board and Secretariat, remains a critical issue that requires robust succession plans.
- ✓ **Ineffective KPI Management:** Our activities are not consistently linked to the strategic goal of enhancing the CFA brand. We lack a formal process to track and review KPIs at the board level, making it essential to establish and implement one.

With these challenges in mind, our strategy will be built on three pillars: "Improving brand value," "Strengthening member engagement," and "Sustainable organizational management."

Strategic Goals



Goal 1:
Improving brand value

Goal 2:
Strengthening member
engagement

Goal 3:
Sustainable
organizational
management

Strategic Goal 1: Improving brand value



To enhance the CFA brand and foster community growth, we will:

- **Collaborate with SAAJ:**
Partner with the Securities Analysts Association of Japan (SAAJ) to explore a CFA Level I exam waiver for their CMA charterholders and CFA's sustainability certificates to both financial and non-financial industries.
- **Strengthen PR and Outreach:**
Boost the public recognition of the Research Challenge by offering more introductory sessions to media and universities. We will also communicate our value to key audiences, including HR departments at financial institutions.
- **Highlight Member Success:**
Share career success stories of CFA charterholders through career event, website and social media to demonstrate the credential's value.

Strategic Goal 2: Strengthening member engagement



To build a truly valuable and vibrant community, we will:

- **Improve Member Understanding & Communication:**
Aim for a 25% annual survey response rate to better identify relevant themes for our events and webinars, and explore ways to make volunteer opportunities more attractive and accessible.
- **Recognize Volunteer Contributions:**
Explore tangible reward mechanisms, such as public recognition on platforms like LinkedIn, to acknowledge our volunteers' efforts.
- **Establish a Corporate Ambassador Program:**
Select member ambassadors from sponsoring companies to champion the CFA's value within their organizations.
- **Increase Corporate Sponsors:**
Increase the number of corporate sponsors from 23 today. This will enable us to promote CFA programs more effectively as well as stabilize our revenue base.

Strategic Goal 3: Sustainable organizational management



To ensure strategic goals are met and the organization grow, we will:

- **Plan for Succession:**
Develop a talent pool and involve volunteer personnel to ensure a smooth transition for directors and committee chairs.
- **Strengthen Secretariat Functions:**
Improve workflow efficiency by introducing digital tools and promoting the use of AI
- **Stimulate Management Committee Activities:**
Create forums for committee leaders to share best practices and formalize requests to the board of directors.
- **Share Priorities Based on KPIs:**
Establish effective KPIs to monitor strategic goals, visualize progress on a dashboard, and conduct regular reviews to ensure alignment across all committees.