

# VISION 2035



Next is here.

## Purpose

Building the most **energized community** of investment professionals around the globe devoted to **improving investment outcomes**.

## Ambition

Our ambition is to cultivate the most sought-after global community of investment professionals **committed to serving clients in their pursuit of improving financial and societal outcomes**.

This community encompasses those at the heart of our mission, CAIA Members, and the wider network of industry professionals we aim to influence and inspire. We will unite a collection of forward-thinkers and innovators advancing the intellectual boundaries of investing and transforming the role of alternative investments in asset allocation and portfolio construction.

As asset classes continue to both blur and converge, what was once alternative is now—or will soon become—mainstream. **We envision a future where we are the go-to, trusted authority for evaluating and integrating formative strategies and modern capital allocation techniques**, enabling today's practitioner to see around the corner on behalf of their clients.

While the heartbeat of our work is in delivering world class education, **we are first a professional body that leads, shapes, and challenges the global investment industry**. Professionals will be drawn to us not only for academic pursuits, but for the career advancement and fulfillment reflected within a vibrant and compelling collective—a member-driven community that sparks innovation and galvanizes a highly diverse group of individuals and enterprises, all genuinely committed to improving investment outcomes and building a more aligned, principled capital market system.

We are creating learning experiences that are dynamic and captivating—designed to engage professionals at every level. **We will be known for our ability to deliver practical insights and inspiring gatherings that lead the industry forward**. Our approach will be proactive, always a step ahead, equipping our network with the cutting-edge tools, solutions, and perspectives they need to navigate ever-evolving capital markets.

Together, we will redefine what it means to be an investment professional as new dynamics and client demands require each one of us to move seamlessly across conventional assets and alternatives. After all, everything is now an alternative.

**This is our vision: a global network bound by a shared commitment to improving investment outcomes**, where we lead with authority, inspire through education and thought leadership, and convene to accelerate impact, all the while celebrating in our collective journey.

What comes next comes first at CAIA. **Next is here.**