

Special Interest Group

CFA Entrepreneurs Network

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1. What are the goals of your group?

The CFA Entrepreneurs Network brings together CFA Charterholders who are entrepreneurs, self-employed, or aspiring business owners. Our mission is to support each other in building and growing successful ventures through shared experiences, discussions, practical advice to foster growth and network connections.

2. Can you please describe what you are planning to do with your group (description of content)?

The CFA Entrepreneurs Network will focus on essential entrepreneurial themes including:

- Business growth strategies and scaling
- Client acquisition and relationship management
- Effective branding, digital presence, and marketing strategies
- Navigating regulatory changes and compliance
- Operational tools and efficiency Identifying and refining niche markets
- Best practices for scaling and growth
- Real-world success and failure insights
- Seed funding and financial strategy
- Psychological resilience and mindset

3. Which format are you planning for your Special Interest Group (online/physical)?

Primarily online meetings, complemented by occasional in-person gatherings.

- Regular online meetings
 - Frequency: Bi-monthly remote sessions
 - Meetings: Structured agenda with key topics provided in advance. All members are encouraged to contribute and propose content for future sessions.
- In-person meetings
 - Frequency: 1-2 a year
 - Potential Agenda points: workshops, showcases/themes, keynotes, social gathering

4. If you have chosen "physical meetings" or "combination of both": in which city do you plan the physical meetings?

Depends on the group composition.

5. Strategic Initiative – Freelance & Project Exchange

To create real business opportunities, we aim to establish an **internal freelance and project-based exchange platform** within the group or in collaboration with the CFA Society Switzerland. Charterholders who need project-based assistance can connect directly with self-employed Charterholders available to offer support. This creates opportunities for collaboration, supports business growth, and leverages the CFA Society's trusted network.

6. Member Expectations

Members should actively participate, openly share experiences and knowledge, and engage positively with fellow entrepreneurs. Members are also encouraged to refer or recommend potential clients or partners to other group members, strengthening mutual business growth.

7. Administrative Commitment

The champions will manage all administrative and operational tasks, including scheduling meetings, content planning, and communication. No funding from the CFA Society is requested, as activities are primarily remote.