

OVERVIEW

CFA Society Cleveland was founded in 1950 and provides investment-related programs and services to its Northeast Ohio-based membership. CFA Society Cleveland has approximately 508 members, and is a member society of CFA Institute, formerly the Association for Investment Management and Research (AIMR). CFA Institute currently represents more than 164,000 members, who include the world's 150,000 CFA Charterholders, in 151 countries and territories.

The mission of CFA Society Cleveland is to promote professional development, ethics, and awareness through outreach to and engagement with the financial community.

- CFA Society Cleveland has approximately 510 members, 75 percent of whom are CFA Charterholders.
- Roughly 90% of our members work directly within the field of investments.
- Approximately 33 percent are responsible for managing assets of private individuals + 54% of members work on the buy-side.
- CFA Institute sets the bar for ethics, integrity and education for all its member societies including CFA Society Cleveland.
- CFA Society Cleveland members' occupations include portfolio managers, research analysts, chief executives, consultants, investment banking analysts and relationship managers (Figure 1).
- Members range in age from 20 to 85 (Figure 2).

Figure 1: Membership Occupation Categories*

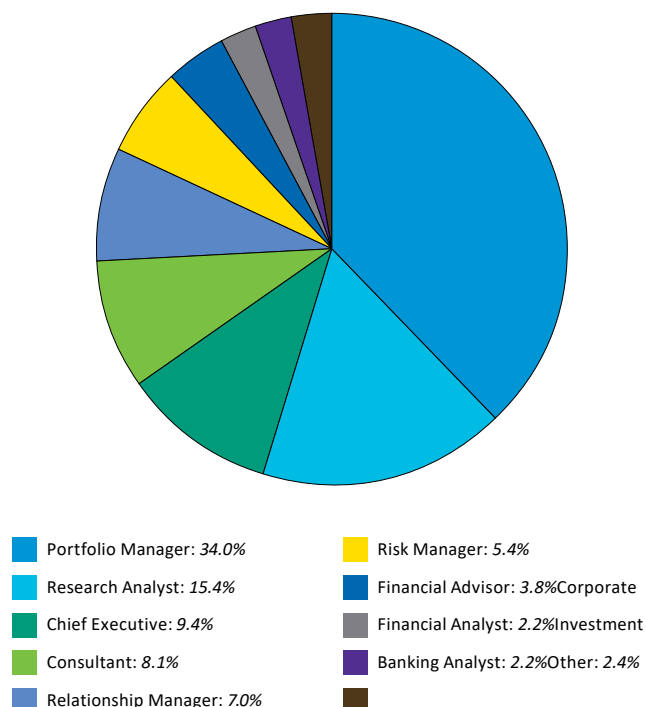
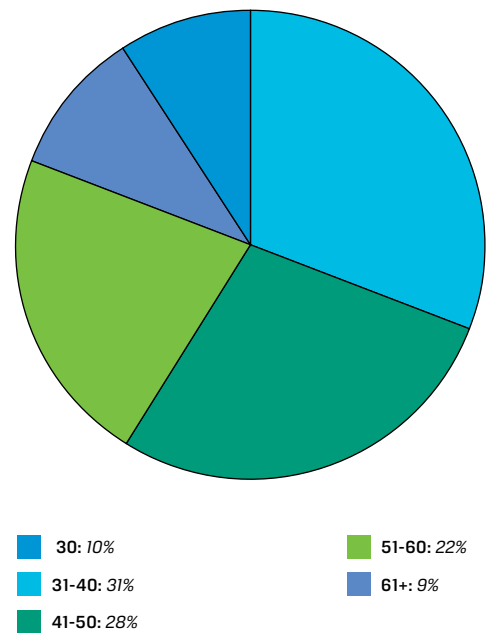


Figure 2: Membership Age Range*



CFA PROGRAM

The CFA Program is a self-study, graduate-level program that requires candidates to learn and apply investment knowledge. It is recognized globally as the gold standard investment credential.

- Three sequential exams cover ethics, investment tools, asset valuation, portfolio management and wealth planning.
- Candidates must complete four years of work experience as an investment practitioner and agree to adhere to a strict code of ethics.

CFA Society Cleveland encourages its members to earn the CFA designation and supports candidates by sponsoring CFA exam study groups and other programs.

MEMBERSHIP BENEFITS

Membership provides benefits to charterholders and non-charterholders alike as a CFA Charter is not required for membership.

Professional Development – complimentary admission to over 20 programming events.

Advocacy – becoming part of an effective and common voice to develop and protect the interest of the profession.

Current Trends – access to resources to help you stay abreast of industry trends.

Networking – access to CFASC and CFA Institute resources, local mentor program, such as job boards, CFASC Newsletter, finance journals and magazines, and other content published by the CFA Institute.

Education – assistance with exam preparation including scholarships, study groups and mock exams.

PROGRAMS AND EVENTS

Regular programming from September to May

- Corporate presentations from executive level officers
- Industry experts
- Market strategists
- Economists
- Continuing education

Social and Networking Events

- Happy hours
- After-exam party

Special Events

- **Wealth Management Conference**
- Charter Awards Lunch
- Annual Dinner
- Harry W. Millis Memorial Golf Outing
- Career Fair

UNIVERSITY RELATIONS AND EDUCATION

CFA Society Cleveland actively provides local universities and CFA Exam candidates with opportunities to participate in educational activities, including:

- CFA Institute Research Challenge for college students.
- CFA Exam preparation through the CFA Society Cleveland's strategic partnership with Schweser.
- CFA Society Cleveland's annual mock exam for all levels.
- Arranging visits by CFA Charterholders to speak to faculty and students.
- Special events sponsored by the CFA Society Cleveland held on campuses of local universities, such as the annual Career Day.

JOIN CFA SOCIETY CLEVELAND:

Regular Membership Cost: \$400 a year (includes \$125 for CFA Society Cleveland membership and \$275 for CFA Institute membership)

CFA Cleveland Local Member: \$150 a year

CFA Candidate Cost: \$125 a year

College/University Student Cost: \$100 a year

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