



September 18, 2009

Dear Fellow CFA Society of Iowa member:

Welcome to the new season! The best way to keep up with what is going on in your Society is to go to our website:

<http://www.cfaiaowa.org>

Even though we have our strategic plan posted to the website, here is a summary of the key goals and some of what we are working on:

Life Long Learning: The vision of life long learning of CFA Iowa is to be the premier facilitator of educational programming and speaker luncheons for investment capital professionals in the state of Iowa. The mission of life long learning of CFA Iowa is to continue to provide, to members and guests of CFA Iowa, high quality speakers with topics relevant to the investment capital profession.

Upcoming Events

10/14/2009 *Barry Griswell* is retired Chairman of the Board and CEO of the Principal Financial Group & **Bob Jennings** is President of Lean Management
11/4/2009 *Ed Kerschner*, Chief Investment Strategist of Citi Smith Barney Wealth Management
12/9/2009 *Gayle Buff, CFA*, of Buff Capital Management

Virtual Relations (Technology): Ensure the CFA Society of Iowa website is a useful tool for all constituencies, including members, candidates, media and community. Develop the website's design to be consistent with the CFA brand and be an extension of the Iowa Society's image. Continue to improve the website as our interaction with the members, candidates, and community we represent and serve.

Watch for more user-friendly web design and layouts

Branding: The overarching Branding strategy is specifically to objectively enhance and improve the value of the CFA Charter throughout the region, in order of importance, to the relevant current major employers of CFA Members, prospective employers of CFA members and the overall professional (CPA, Legal, Medical) and High Net Worth constituencies.

- *Look for tools you can use as a member to improve the value of your membership.*
- *We are also undertaking other significant efforts to further the strategy – ask Eric Lohmeier for details!*

Outreach: Ensure the CFA Society of Iowa enlarges presence among investment professionals in the state of Iowa.

- *CFA Charter Ceremony in early December*
- *Research Challenge with four University teams entered*
- *Practice exams for next June*
- *Watch for social and career building events*

Board Membership for 2009 -2010

President	Phelps Hoyt	hoyt.phelps@principal.com
Vice President	Kevin Freese	kevin.a.freese@wellsfargo.com
Treasurer	Sasha Kamper	kamper.sasha@principal.com
Secretary	Russ Rowley	rowley.russ@principal.com
Director CFA Programs	Laura Beebe	Laura.beebe@fbfinancial.com
Director Outreach and Awareness	Eric Lohmeier	elohmeier@ncpinonline.com
Director Member Value	Karey Anderson	karey.s.anderson@emcins.com
Director Technology and Operations	Sayer Martin	smartin@theclaritygroup.com
Past President	Laurie Mardis	lmardis@wbcap.net

Committee Composition

Programming Committee	
Kevin Freese (chair)	kevin.a.freese@wellsfargo.com
Allen Goody	agoody@wbcap.net
Ross Schuchart	rschuchart@gmail.com
Member Value Committee	
Karey Anderson (chair)	Karey.S.Anderson@emcins.com
Laurie Mardis	lmardis@wbcap.net
Matt Bral	matthew.g.bral@smithbarney.com
Outreach and Awareness Committee	
Eric Lohmeier (Chair)	elohmeier@ncpinonline.com
Gwen Swanger	jgswan4@msn.com
CFA Programs Committee	
Laura Beebe (chair)	Laura.beebe@fbfinancial.com

As always, we welcome input from members about what is important and what can be improved. If you have ideas or suggestions please contact any of our Executive Board or other committee members. And be sure to bookmark your website! We look forward to another great year.

Sincerely,

Phelps B. Hoyt, CFA
 President, CFA Society of Iowa
www.cfaiowa.org