



**CFA Society
New Mexico**

About CFA Society New Mexico

CFA Society New Mexico was founded on May 23, 1998, as a member organization for CFA Institute. The society's mission is to lead the investment profession in the State of New Mexico by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

The society seeks to fulfill its mission by:

- To develop future professionals through assisting CFA exam candidates and college students to pursue credentialing and careers in investment management and analysis.
- To deliver member value that accelerates the professional success of our members.
- To build market integrity that benefits investors and our members that serve them.

CFA Institute is the premier global association for investment management professionals, with over 178,000 members in 165 countries & regions, through 162 societies.

- CFA Society New Mexico has over 100 members, 93% are charterholders.
- Approximately 49% manage private assets, and 47% manage institutional assets.
- Members' occupations include: portfolio managers, chief-level executives, research analysts, financial advisors, consultants, relationship managers, strategist, traders, and more.
- The top five employers of members and candidates in the area include: Thornburg Investment Management, Inc., Avalon Trust Company, RBC, New Mexico State Investment Board, and Bank of America Merrill Lynch.

Leadership

Officers

President

Sonny Gokhale, CFA

Vice President

Debby Su, Ph.D, CFA, FRM

Treasurer

Andrew Hockey, CFA

Secretary

Di Zhou, CFA

Committee Chairs

Co-Chair Membership/ Advocacy/ Scholarship

Miguel Cortabarría, CFA

Co-Chair Membership/ Advocacy/ Scholarship & University Relations Chair

Debby Su, Ph.D, CFA, FRM

Ex Officio & Co-Chair Program

JJ Milder

Co-Chair Program

Nicholas Anderson

Sponsorship Chair & University Relations Committee

Sonny Gokhale, CFA

Women's Advisory Chair, University Relations Committee & Candidate Coordinator

Callie Poerio

Director-At-Large & University Relations

Reilly White, PhD

Find us at:

93%
Chaterholder
Member

62%
Buy-side Professionals
at Institutional Firms

81%
Male Members

19%
Female
Members

50.3
Average Member
Age

MEMBERSHIP BENEFITS

As a member of a truly global organization, we provide such benefits as:

- Local professional development opportunities including discount to dynamic educational programs.
- Becoming a part of an effectual and common voice to develop and protect the interest of the profession.
- Staying abreast of trends that affect the industry and our market.
- Access to CFA Society New Mexico and CFA Institute resources such as Career Center, finance journals, magazines, and other content our organizations publish.

MEMBERSHIP REQUIREMENTS

Regular Member

- Member of CFA Institute and CFA Society New Mexico
- 4000 hours of work experience
- Pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct
- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience
- Pass Level 1 of the CFA exam or other such appropriate examination as approved by the Board of Governors, or pass the self-administered Standards of Practice Exam

REFERENCES

Three professional references are required with your application. If one of your references is from a regular member of CFA Society New Mexico, then only two professional references are required. References from your supervisor(s) are preferred.

VOLUNTEER OPPORTUNITIES

Get even more out of your society membership by volunteering to serve on a society committee, running for an officer position, or serving on the board. For more information on events and opportunities available within New Mexico, please visit our website at www.cfasociety.org/newmexico

JOIN CFA SOCIETY NEW MEXICO

Regular & Affiliate Society Membership Dues: \$55

Regular & Affiliate Professional Leave Dues: \$45

Members 70+ Dues: Free

CFA Institute Membership: \$275

For full information please visit our [membership page](#), or to apply for membership, visit [CFA Institute's website](#)



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