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CFA Society Cleveland
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Dear Members and Readers,

September is normally a very busy month for CFA Society Cleveland, and this year was no exception. The programming season kicked off with a very well attended happy hour at Bar Louie that attracted more than 70 attendees and was followed by luncheons featuring presentations on China's economic situation and trends in the banking industry. The month closed with a fantastic presentation by Ivy Zelman on the housing industry that drew more than 125 attendees.

Also last month, the CFA Institute held its annual Society Leadership Conference (SLC) in Hong Kong, and Wayne Chamberlain, CFA, and Paul Lebo, CFA, attended to represent our Society. This was the first SLC held outside of the United States, signifying the CFA designation is truly a global brand. A number of items affecting our industry and Society were addressed over three days, including the public's loss of trust in the investment profession and what local societies can do in their markets to help restore that trust. I'm proud to report that CFA Society Cleveland has been very proactive in aligning with CFA Institute on these efforts and I hope our members benefit from it.

Finally, we introduced two new membership classes in September, both of which allow non-CFA Charterholders, candidates, and students who agree with our mission and values to join the Society and experience many of the benefits our regular members enjoy. The initial response and level of membership applications have been very encouraging and indicate that CFA Society Cleveland is viewed as a premiere source of educational content and career development. If you have colleagues who are interested in joining, please have them contact us or visit our website to download an application.

While September was a good month, October's on track to be even better. With the presidential election approaching, CFASC is hosting several timely events thanks to Program Chair Craig Cimoroni, CFA, and his committee. On Oct. 8, Dr. Arthur Laffer, a member of President Reagan's Economic Policy Advisory Board, will present to a sold out audience at the City Club, and on Oct. 16, Greg Valliere of Potomac Research Group will present "The Election and Implications for Investors." These presentations should bring invaluable awareness to our Society and the Board hopes to capitalize on it.

The CFASC Board is working very hard to ensure it is delivering the utmost value to members through programming and a range of other activities. As always, if you have suggestions or comments as to how we can expand or improve our efforts, don't hesitate to contact me directly to share your ideas.

Sincerely,

James M. Bailey, CFA
President, CFA Society Cleveland

SPECIAL THANKS TO OUR PROGRAM SPONSORS:



Teri Chmielewski understands that your home is not only a place of security, comfort and love for you and your family. Your home is also a real estate asset that is an important part of your investment portfolio.

As the real estate market settles and opportunities come into focus, look toward Teri to provide sound and intelligent real estate advice. Partnering with her husband Ben, who specializes in Commercial Real Estate, Teri can meet all of your real estate needs.

For ten years, Teri has been a leader in the Greater Cleveland real estate community and can help lead you into the future.



KELLER WILLIAMS GREATER CLEVELAND

Teri Chmielewski REALTOR®

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PROGRAMMING



Dr. Arthur Laffer, Economist, Founder & Chairman of Laffer Associates



October 8: Dr. Arthur Laffer, Economist, Founder & Chairman of Laffer Associates

Dr. Arthur Laffer is founder and chairman of an economic research and consulting firm providing investment research services to institutional asset managers. Since its inception in 1979, the firm's research has focused on the interconnecting macroeconomic, political and demographic changes affecting global financial markets.

Recently, Dr. Laffer was appointed as a founding member of the Congressional Policy Advisory Board, a select group of advisors who assist in shaping legislative policies for the 105th United States Congress.

Dr. Laffer was a member of President Reagan's Economic Policy Advisory Board for both of his two terms from 1981 to 1989. He was a member of the Executive Committee of the Reagan/Bush Finance Committee in 1984, and was a founding member of the Reagan Executive Advisory Committee for the presidential race.

Dr. Laffer has been widely acknowledged for his economic achievements. He was noted in *Time* magazine's March 19, 1999, cover story as one of "The Century's Greatest Minds" for inventing the Laffer Curve, which it deemed one of "a few of the advances that powered this extraordinary century."

October 16: "The Election and Implications for Investors," presented by Greg Valliere, Chief Political Strategist with Potomac Research Group

Mitt and Barack have varying views on many issues that will affect the economy, capital investments, tax structure, corporate cost structure and other areas of corporate fundamentals. We will host an excellent speaker, Greg Valliere, Chief Political Strategist with Potomac Research Group, on Oct. 16 who will address topics related to the upcoming presidential and congressional elections, with an emphasis on the fiscal cliff and tax policy. Greg will examine Federal Reserve policy and the potential for deficit reduction in 2013, and he also will focus on geopolitical hot-spots, including Israel-Iran.

With more than 30 years of experience covering Washington for institutional investors, Greg Valliere coordinates political and economic research. He focuses on how Congress and the White House shape fiscal policies and monitors the Federal Reserve Board's interest rate policies. Prior to joining Potomac Research, Mr. Valliere served as Chief Policy Strategist for Soleil Securities Corporation. He previously held key strategy roles at Charles Schwab's Washington Research Group and The Washington Forum. Mr. Valliere co-founded The Washington Forum in 1974, serving as Chief Political Analyst and editor of the group's publications, and ultimately as Research Director. He began his career in 1972 at "F-D-C" reports, a trade publication monitoring the pharmaceutical industry. Mr. Valliere earned his Bachelor's degree in Journalism from The George Washington University. He is an exclusive commentator for CNBC, appearing regularly on network programs such as "Squawk Box," "Power Lunch," "The Closing Bell," and "Kudlow & Company."

PROGRAMMING



October 24: "Forensic Accounting: Trends and Techniques To Watch Out For," presented by Michael Gyure, Forensic Accountant at Wunderlich Securities

Mike has been a senior forensic accounting analyst since 2002, most recently working for Wunderlich Securities, providing accounting insights to investors on companies in nearly all industries and, most recently, in the clean energy, consumer, industrial, technology, healthcare and financial areas. Prior to 2002, Mike was employed by the international accounting firm Arthur Andersen, where he spent 13 years as an auditor working in the Cleveland, Ohio, and Silicon Valley, California, offices. Mike was a founding member of the Financial Accounting Standards Board's (FASB) Investors Technical Advisory Committee serving from 2007-2009. The Committee provides advice to the standard setters on current and potential FASB projects. Mike is a CPA and holds a BS in Accountancy from Miami University in Ohio.

October 31: "Part 2: The Global Sovereign Debt Crisis and its Impact on Corporate Profits - Merkel's Revenge," presented by Nick Raich, CFA, Senior Vice President & Director of Research at Key Private Bank

Nick Raich is Senior Vice President and Director of Research for Key Private Bank, a position he has held since May 2010. He is responsible for managing the investment research process throughout Key's footprint and manages a team of analysts evaluating equity, fixed income, derivatives, and alternative investments in client accounts.

In addition to providing leadership to the research team, Nick is a senior member of the investment management team and a member of Key's Portfolio Construction Team.

Experience & Education:

- MBA and BS in Finance from Youngstown State University
- Chartered Financial Analyst designation
- A total of 13 years of experience as Director of Research at Zacks Investment Research in Chicago and National City's Private Client Group in Cleveland
- Member of the Forbes Investment Panel
- Makes frequent appearances in national and regional print media and on television, including CNBC, Bloomberg TV, *The Wall Street Journal*, *The New York Times* and *Business Week*

PROGRAMMING

THE SCHORK REPORT

A VIEW OF THE ENERGY & SHIPPING MARKETS



Brian Brennan
Division Head, Fixed
Income, KeyBanc
Capital Markets

November 7: "The Role Domestic Energy Resources Play in the American Economic Recovery," presented by Stephen Schork, Founder & Editor of The Schork Report

Stephen Schork is the Founder and Editor of The Schork Report, a daily subscription research note providing comprehensive technical and fundamental daily views of the energy cash and financial markets.

Published since 2005, The Schork Report is geared toward professionals in the global energy arena looking to improve economic performance while managing risk. Mr. Schork guides research and analysis activities and oversees the development of proprietary mathematical models designed to identify pricing inefficiencies. He is also active on a consultative level with subscribers, offering unparalleled direct access and personalized counsel.

Prior to founding The Schork Group, Inc., Mr. Schork was a floor trader (Local) in the New York Mercantile Exchange's energy complex and has more than 20 years' experience in physical commodity and derivatives trading, risk systems modeling, structured commodity finance, trading-room operations and research.

A recognized expert in the energy sector, Mr. Schork is a regular guest on CNBC and Bloomberg Television. Mr. Schork is also frequently quoted in *The Wall Street Journal*, *Business Week*, Reuters, the *Associated Press*, Platts, The Street.com and CNNMoney.com.

November 14: Charter Awards Dinner - SAVE THE DATE

Brian Brennan is the Managing Director and Division Head for Fixed Income at KeyBanc Capital Markets (KBCM). He also manages the Corporate Investment Services group, which provides expertise in short term investments for all of Key Corp's clients.

Brian joined Key Bank in 1995 from Donaldson Lufkin and Jenrette Securities. Prior to that, he played nine years in the NFL for the Cleveland Browns, Cincinnati Bengals and San Diego Chargers. Brian is also Chair on the internal Credit Committee for KBCM fixed income, and sits on the FINRA Fixed Income Committee. He recently joined the Board of Directors of Notre Dame College of Ohio and is a Board of Director Emeritus for Boys Hope Girls Hope of Northeast Ohio. His charity golf tournament, The Brian Brennan Boys Hope Open, has raised more than \$4.5 million. Hosted by Brian, the Boys Hope Open is considered the largest event of its kind incorporating more than 40 corporate sponsors and 350 players. Also, Brian was active as a local radio host on WTAM from 1999-2005, and television personality by broadcasting the pre-season Cleveland Browns games for CBS in 2005-2006.

Brian holds a Bachelor's Degree in Finance from Boston College, and has series 7, 9, 10, 24, 53 and 63 securities licenses.

Stay tuned! More information is forthcoming.

MEMBERSHIP



Leslie Douglas, CFA
Member, CFA Society
Cleveland

MEMBER PROGRESSES CAREER-WISE THANKS TO CFA DESIGNATION

Interview conducted by Brett Hillard, CFA, Membership Committee Member

Leslie Douglas, CFA, began her career at Society Bank in 1971, analyzing and pricing the bank's portfolio of munis. After learning about muni and bank portfolio management, Leslie was tasked with trading munis, and was also responsible for following stocks in the Banking, Food and Bev, Drugs and Metals industries and making recommendations for client accounts. She began managing client accounts in 1975, and has been managing portfolios for 37 years.

Leslie entered the CFA program in 1979 and earned her Charter in three years. She explains: "The CFA Charter gave me credentials and helped me in my career progression. I recommend that candidates are very diligent with their studies as the body of knowledge has expanded exponentially since I went through the program."

Over time, Leslie became Team Lead and built out portfolio management teams in Cleveland and Albany. She managed those teams for five years and then was appointed to a role focusing on compliance. Leslie was the first woman to fill many roles within the bank, including analyst, portfolio manager, officer and department head.

When asked about the client she has served the longest, Leslie noted one she has worked with for 36 years. The client owned racing horses and would keep a certain cash level in case she came across a horse she liked. This client invested in "alternatives" such as Broadway shows and a venture to find gold in sunken ships, which turned out to be a profitable investment.

MEMBERSHIP

NEW MEMBERSHIP CLASSES

The CFASC Board of Directors is pleased to announce two new classes of membership, which will have a strong positive influence on the membership base. Please direct all questions to Paul Lebo, CFA, Membership Chair, at membership@cleveland.cfasociety.org.

Local Society Membership:

Candidate Membership: \$125

Non-Candidate: \$150

- Open to the general investment and finance community that meet certain requirements
- Receive all benefits regular members of the Society receive except voting privileges and any benefits granted by the CFA Institute (i.e. certain web access, etc.)
- Access to all membership events at member rates

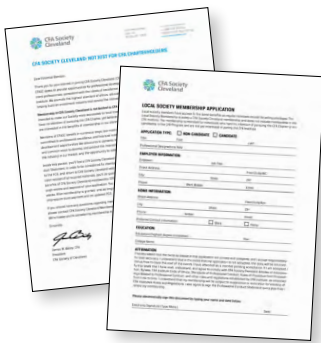
Requirements include:

- Two letters of recommendation, one from a CFA charterholder and one from a direct manager
- At least one year of full-time work experience
- Bachelor's degree or equivalent
- Agree to adhere to the Code of Ethics and Standards of Professional Conduct
- Membership is at the will of CFA Society Cleveland and may be terminated at any time if any action taken by the member violates the Code of Ethics and Standards of Professional Conduct or reflects poorly on CFA Society Cleveland

Student Membership: \$100

- Known as a Student Member of CFA Society Cleveland
- Access to 10 regular events at no charge
- Membership is at the will of CFA Society Cleveland and may be terminated at any time if any action taken by the Student Member reflects poorly on CFA Society Cleveland

Applications are now available. To access them, please visit:
www.cfasociety.org/cleveland/Pages/BecomeaCFASCMember.aspx.



Click Here for Membership Applications

EDUCATION



MOCK EXAM:

CFA Society Cleveland is thrilled to announce two strategic partnerships with CFA test-prep providers, making it less expensive for you to prepare for the upcoming December CFA exam.

OPTION #1: Boston Securities Analysts Society (BSAS)

BSAS has been offering a successful practice exam to CFA Candidates at all three levels for the past 17 years. The BSAS practice exam is widely considered the best proxy for the regular exam and is a great way to judge your level of preparedness.

Cost: \$149 enables you to download a PDF of the mock exam and work at your own pace. To purchase, visit www.bsas.org/pe and click on the "Purchase PDF" tab. **USE COUPON CODE CLEVE.**

OPTION #2: Kaplan Schweser

Schweser offers a number of different packages and options to choose from.

Over the past 20 years, Kaplan Schweser has helped hundreds of thousands of candidates prepare for the CFA exam. Connect with the prep provider more candidates turn to for a concise review of the curriculum, expert instruction by CFA charterholders, and online tools that allow you to study anytime, anywhere. Kaplan Schweser—the essential complement to the CFA curriculum.

Go to portal.schweser.com

Use Discount Code: ClevelandCFA and receive 15% off the retail price!

CFA Society Cleveland holds live mock exams for the June examinations using the BSAS tests, but has never offered one for the December Level I exam due to lack of demand. If you have an interest in taking a mock exam for the upcoming December Level I, please let us know. If demand is appropriate, CFASC will consider hosting a live mock.

CFA INSTITUTE RESEARCH CHALLENGE: MENTORS, GRADERS & JUDGES NEEDED

The nine Northeast Ohio university teams participating in this year's CFA Research Challenge (up from four last year) are busy advancing toward their goal of completing both a written report and an oral presentation in early 2013. The written reports are slated to be completed on Feb. 1, 2013, with the oral presentations to be held Saturday, Feb. 16, 2013, (or Saturday, Feb. 23, in the event of adverse weather on Feb. 16). **CFA Society Cleveland still has a few openings for Team Mentors, Report Graders and Presentation Judges. Please contact Greg Halter at 216-767-1340 to volunteer.**

This year's participating universities include: Case Western Reserve University, Cleveland State University, the University of Findlay, Hiram College, John Carroll University, Kent State University, University of Mount Union, Walsh University and Youngstown State University.

Continued on page 9

EDUCATION

THE CFA INSTITUTE RESEARCH CHALLENGE IS A GLOBAL COMPETITION THAT PROVIDES UNIVERSITY STUDENTS WITH HANDS-ON MENTORING AND INTENSIVE TRAINING IN FINANCIAL ANALYSIS AND PROFESSIONAL ETHICS.

CFA INSTITUTE RESEARCH CHALLENGE: MENTORS, GRADERS & JUDGES NEEDED, CONTINUED

ABOUT THE RESEARCH CHALLENGE:

The CFA Institute Research Challenge is a global competition that provides university students with hands-on mentoring and intensive training in financial analysis and professional ethics. Each student participant will be tested on his or her analytic, valuation, report writing and presentation skills and gain real-world experience as he or she assumes the role of a research analyst. Last year, more than 3,000 students from 650 universities in 55 countries participated and learned best practices in equity research from leading industry experts.

Local CFA societies host and launch local competitions involving teams of three-to-five business and finance students from participating universities who work directly with a local company, Faculty Advisor and Mentor in researching and preparing a company analysis – a Sell-Side Research Report. This year, CFA Society Cleveland is working with **Lincoln Electric Holdings, Inc. (NYSE: LECO)**, the leading welding equipment and consumable company in the world. The Company's 2012 sales were in excess of \$2.69 billion, with more than 50% outside of the United States. Net income surged 68% year-over-year to more than \$217 million, with high returns – 11.6% ROA, 18.6% ROE and 31.5% ROIC.

Analysis of a Public Company: Teams research a publicly traded company, and company management presents to the teams and participates in a Q&A session.

Mentoring by a Professional Research Analyst: Each team works with a CFA charterholder who mentors the team during the research process and reviews and critiques its report.

Writing a Research Report: Each team produces an Initiation of Coverage report on the chosen company. The report is reviewed and scored by a group of judges.

Presentation of Research to a Panel of Experts: The teams' final presentations are locally evaluated by high-profile panels of experts from top financial institutions: Heads of research, portfolio managers, and chief investment officers. The team with the highest combined report and presentation score is declared the winner of the Local competition.

The Research Challenge is composed of three levels of competition. Local (Cleveland), Regional (Ontario, Canada – March 2013) and Global Final (London – April 2013).

For more information, visit: www.cfainstitute.org/cfaprogram/challenge/Pages/index.aspx.

ADVOCACY

CFA INSTITUTE WILL CONDUCT ITS ANNUAL GLOBAL MARKET SENTIMENT SURVEY (GMSS) IN OCTOBER TO GATHER MEMBER PERSPECTIVES ON MARKET INTEGRITY, PERFORMANCE AND OTHER ISSUES.



Mohini Singh, ACA

ADVOCACY: GLOBAL MARKET SENTIMENT SURVEY

CFA Institute will conduct its annual Global Market Sentiment Survey (GMSS) in October 2012 to gather member perspectives on market integrity, performance and other issues. This year's survey will cover many of the same issues as last year's, which had questions regarding the economy, asset returns, investment management employment prospects, global debt markets, risk and market integrity.

The purpose of the GMSS is to: Build brand awareness for CFA Institute and our mission (promote ethical markets); become a recognized voice toward restoring trust in the financial markets; and improve society and member engagement on issues of ethics, standards and policy. No other organization has the CFA Institute's ability to gather global perspectives from highly trained, ethical investment professionals, whose opinions carry weight with market participants and media around the globe.

CFA Society Cleveland would like a high participation rate so the survey fully reflects our members' views. The 2012 survey is mostly multiple choice with one narrative response question. The time needed to participate in the survey is minimal, though its potential impact with the general public is great. The survey is expected to be published in early 2013. Once published, it will be accessible to members, media and the general public through the CFA Institute's website.

If you have questions, please contact Wayne Chamberlain, CFA, Advocacy Chair, CFA Society Cleveland, at advocacy@cleveland.cfasociety.org.

FINANCIAL STATEMENT DISCLOSURES: STANDARD SETTER, REGULATOR, AND INVESTOR PERSPECTIVES

Mohini Singh, ACA

Over the past few years, concerns have been voiced regarding the effectiveness of financial reporting disclosures. Some feel that current disclosures fall short of providing sufficient transparency and telling investors a comprehensive story of the business. Others point to the growing volume of disclosures and the belief that investors are inundated with so much information that they're unable to find the most relevant details within ever-growing annual reports.

Against this backdrop, CFA Institute recently held a webinar, "**Financial Statement Disclosures: Standard Setter, Regulator, and Investor Perspectives,**" to discuss the Financial Accounting Standards Board (FASB) and European Financial Reporting Advisory Group (EFRAG) proposals for developing a disclosure framework and improving financial disclosures. In addition, based upon the results of a survey conducted by CFA Institute earlier this year, the webinar provides:

- Investor views on current financial disclosure information and what changes are necessary to afford greater transparency
- CFA Institute recommendations on the development of a disclosure framework and enhancing the effectiveness of financial disclosures.

FEATURE ARTICLE

**A BOLDER VOICE THEME
RESONATED THROUGHOUT
THE CONFERENCE, PERHAPS
MOST IMPORTANTLY AS
IT RELATES TO ADVOCACY
AND THE CHANNELING OF
RESOURCES.**

RECAP OF THE SOCIETY LEADERSHIP CONFERENCE IN HONG KONG

Membership Chair Paul Lebo, CFA, and Advocacy Chair Wayne Chamberlain, CFA, represented CFA Society Cleveland at the Society Leadership Conference in Hong Kong. The following is a recap from their viewpoint.

On Sept. 12, 400 delegates from CFA societies across the globe converged in Hong Kong for the annual Society Leadership Conference. Amidst the backdrop of Hong Kong's impressive skyline, the conference opened with remarks from John Rogers, President and CEO of the CFA Institute. Mr. Rogers boldly committed the CFA Institute and its local societies to taking on a stronger voice and a broader mission. The goal is to lead the investment industry globally and to reinstate public trust in the investment profession.

The bolder voice theme resonated throughout the conference, perhaps most importantly as it relates to advocacy and the channeling of resources. There are several states in the U.S., like Texas, for example, that have combined individual societies into one. While each of the four local societies in Texas remains active and independent, the formation of CFA Society Texas has enabled greater collaboration on a range of areas. Each of Texas' local societies has appointed two members to serve on the eight-person Board for CFA Society Texas. From an advocacy perspective, CFA Society Texas will have greater influence on regulators and regulations if it can speak for more than 1,500 members rather than 400. This same level of collaboration is being discussed among the CFA societies in Ohio. It is felt that if our efforts are combined and unified, we will have a much greater impact on the financial and regulatory environment in the state. We will keep you updated as things progress.

Another important component of the broader mission is to expand the scope of the Presidents' Council. The general Council meetings, consisting of all CFA society presidents, will increase in length, and will provide greater opportunities for discussion and voting. At the same time, the Presidents' Council Representatives (PCRs), will adopt new powers and responsibilities as they serve the broader Council. Finally, a motion was put forward to transform the PCR Chair into a formal governor of the CFA Institute Board of Governors. This will allow CFA Society Cleveland, as well as other local societies, to have more of a voice regarding decisions made by the CFA Institute.

CAREER SERVICES

MAI WEALTH ADVISORS: Associate, Advisory Services Department

As an Associate in MAI's Advisory Services Department, you will be joining a team of highly experienced investment and wealth planning professionals dedicated to the long-term growth of the firm and serving new and existing MAI clients.

The foundation of your role is client service and will include the transition of new clients to MAI and providing outstanding service throughout the relationship. You will develop processes and procedures, in conjunction with the team, to provide client service.

You will coordinate the initial discovery and data gathering process and organize the information obtained from the client. You should be proactive in helping us keep on track with specific client projects and the daily planning and investment work. You will participate in client meetings and manage the follow-up process.

Additionally, you will help the team develop and prepare presentation materials for clients by integrating the investment and financial planning reporting along with identifying and using new tools. This requires a solid background in Excel, Word, Power Point, CRM, Advent Axys and the ability to learn other programs as necessary.

The successful candidate will have the following qualifications:

- Bachelor's degree in Accounting, Finance, Business or Economics preferred
- Advanced designations preferred (CPA, CFP, CFA, etc.)
- Client service experience preferably in financial services industry
- Basic presentation skills
- Basic financial, wealth management, estate planning and financial planning knowledge
- Strong interpersonal communication skills with a consultative style
- Considerable knowledge of financial products and services
- Organized, self-motivated and the ability to learn quickly.
- Computer skills in Microsoft Office Suite of programs and the ability/interest to learn to use new software as needed.

For more information, contact Laurie Roggenburk at lroggenburk@maiwealth.com

MAI WEALTH ADVISORS: Senior Associate, Client Data Management

Position Summary: Responsibilities include supporting the Managing Partner with client data management and reporting needs. Will directly be involved with the management reporting process of our top High Net Worth clients and assisting in both the quantitative and qualitative aspects of a key client's portfolio. Will play a lead role consolidating client information into management reports highlighting areas for discussion.

Duties and Responsibilities:

- Prepare client management reports
 - Consolidate client financial information from various financial institutions into a management report summary to be presented to the client.
 - Review client financial summaries and interpret material changes in financial conditions.
 - Development of ad hoc reporting for clients/managing partner.
 - Responsible to ensure the data integrity of all client reporting materials.
- Maintain client information stored on CRM.
- Assist in the research of various investment alternatives suitable for high net worth clients.
- Review and analyze various client tax documents.
- Oversee account administration for clients including onboarding, data updates, transfers and wires.
- Works closely with Investment Operations for data management needs.

Competencies: Strong written, analytical and oral communication skills. Proficiency in Microsoft Office Suite (Outlook, Excel, Word, PowerPoint, Access) and the aptitude to learn various other investment research tools. Ability to work as a member of a team. High attention to detail. Ability for data collection and interpretation.

Experience Requirements: 2 + years' experience in an analytical role within the financial services industry.

Education: Bachelor's degree; Finance, Accounting or Economics background preferred

For more information, contact Laurie Roggenburk at lroggenburk@maiwealth.com