

# CFA Society Cleveland Wealth Management Conference

Friday September 21, 2018 11:30 AM to 5:00 PM, Hilton Downtown

Join leading financial industry professionals for the CFA Society Cleveland's 2nd Annual Wealth Management Conference. The event will feature key note speaker David Rubenstein, The Carlyle Group and a day of industry professionals. The day will include lunch, four speakers and happy hour to network with colleagues, clients and industry leaders.



## Key Note Speaker



### David Rubenstein The Carlyle Group

- American financier and philanthropist
- Co-Founder and Co-Executive of The Carlyle Group
- Chairman of the Kennedy Center for the Performing Arts, chairman of the Smithsonian Institution, chairman of the Brookings Institution, and President of the Economic Club of Washington, D.C.

## CFA Society Cleveland

510 members

75% 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.

- Portfolio Manager: 34.0%
- Research Analyst: 15.4%
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- Consultant: 8.1%
- Relationship Manager: 7.0%
- Risk Manager: 5.4%
- Financial Advisor: 3.8%
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- Investment Banking Analyst: 2.2%
- Other: 2.4%

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