2017-2018
incoming board

President
John N. Fuller, CFA
H&H Investment Advisors, Inc.

First Vice President and President-Elect – Programs
Juliana B. Dalton, CFA
Webster Bank

Second Vice President - Membership & Advocacy
Frederic C. Filippelli, CFA, ChFC, CLU
Prudential Retirement

3rd Vice President - Education
Pamela E. Minish, CFA, CAIA
Key Private Bank

Treasurer & Secretary
Elisabeth (“Lisa”) V. Piker, CFA
Cigna Investment Management

Immediate Past President
Raymond H. Bovich, CFA
Aegis Wealth Partners

Past President
Kim L. DiPietro, CFA
Hart Realty Advisers

2016-2017
outgoing board

President
Raymond H. Bovich, CFA
Aegis Wealth Partners

Treasurer & Secretary and President-Elect
John N. Fuller, CFA
H&H Investment Advisors, Inc.

First Vice President – Membership & Advocacy
Shannon Carbray, CFA
HIMCO

Second Vice President - Education
Frederic C. Filippelli, CFA, ChFC, CLU
Prudential Retirement

Third Vice President - Programs
Pamela E. Minish, CFA, CAIA
Key Private Bank

Immediate Past President
Juliana B. Dalton, CFA
Webster Bank

Past President
Kim L. DiPietro, CFA
Hart Realty Advisers
Program Committee
The committee organizes monthly educational programs either at breakfast, lunch or evening socials. The content may include a live speaker or webcast. The programs offer members the opportunity to maintain and improve their professional competence in an environment conducive to networking. Continuing professional education credits are awarded.

Current Chair: Pamela Minish, CFA, CAIA
Incoming Chair: Juliana Dalton, CFA

Investment Conference Committee
The committee selects the speakers and organizes the agenda for the Investment Conference, which occurs semi-annually in the fall and spring. The committee works with the Program chair.

Current Chair: Richard Razza, CFA & Pamela Minish, CFA, CAIA
Incoming Chair:

Annual Forecast Dinner Committee
The committee organizes the Annual Forecast Dinner and manages the financial budget. The committee selects the event speaker(s) and seeks to engage sponsors for the event and the year.

Current Chair: Shannon Carbray, CFA & John Fuller, CFA
Incoming Chairs:

Career Services Committee
The committee organizes career programs to serve the needs of unemployed members, members seeking a career change and students interested in CFA careers. The committee seeks to develop a career day to serve the membership and community.

Current Chair: Pamela Minish, CFA
Incoming Chair: Juliana Dalton, CFA

Membership Committee
The committee fulfills three primary goals: membership recruitment, renewals, and manages communication to our members. The committee also evaluates member satisfaction and oversees recognition among members for the local society and CFA Institute.

Current Chair: Shannon Carbray, CFA
Incoming Chair: Frederic C. Filippelli, CFA, ChFC, CLU

Education Committee
The committee works with the CFA Institute Education Foundation to promote programs for members. The Committee will also work with the Program, Career and Forecast Dinner Committees to create programs with educational content to fulfill the goals of the membership and the CFA Institute.

Current Chair: Frederic C. Filippelli, CFA, ChFC, CLU
Incoming Chair: Pamela Minish, CFA, CAIA

University Liaison Committee
This committee serves as the primary communication link between the Society, universities and school programs in our region. They actively seek to develop relationships with professors and students to develop programs that are of interest to students, members and the community including the Global Research Challenge. They will also promote the CFA Charter.

Chair: Gail Bruhn, CFA

Advocacy Committee
The committee serves as the focal point to promote the CFA charter, CFA Society Hartford and build relationships with employers within the society’s region.

Current Chair: Shannon Carbray, CFA
Incoming Chair: Frederic C. Filippelli, CFA, ChFC, CLU

Investment Committee
Investment committee makes recommendations about asset allocation, investments, and reviews policies.

Chair: Ned Steiger, CFA, CPA

Financial Literacy
The committee works with the Junior Achievement group to bring financial literacy volunteers to Hartford region schools through volunteer involvement

Chair: Jim Newman, CFA

Strategic Planning Committee
The Hartford CFA Board serves as the primary members to develop the Strategic Plan and review it each year. The Board will establish multi-year goals and seek volunteers to assist in achieving the objectives. Anyone can participate.
**NETWORKING EVENTS**

Fall Social  
Hot Tomato’s Restaurant, Hartford  
September 15  
28 attendees

Winter Social  
Wadsworth Atheneum  
December 5  
67 attendees

Spring Social  
City Steam Brewery Cafe  
March 23  
23 attendees

**FINANCIAL LITERACY PROGRAMS**

Fall 2014  
Parkville Community School  
Hartford  
9 volunteers  
10 classrooms reached

Winter 2015  
Breakthrough Magnet School  
Hartford  
9 volunteers  
5 classrooms reached

**BOARD MEETINGS**

August 14  
Conference Call  
6 attendees

September 11  
H & H Investment Advisors

October 10  
Conference Call  
7 attendees

November 14  
The Society Room  
10 attendees

December 12  
Millright, Simsbury  
8 attendees

October 9  
Conference Call  
7 attendees

November 12  
Conference Call  
7 attendees

December 11  
Millwrights, Simsbury  
12 attendees

January 17  
Butterfly Chinese Restaurant  
6 attendees

February 21  
Conference Call  
7 attendees

March 21  
Conference Call  
4 attendees

April 18  
H & H Investment Advisors  
9 attendees

May 16  
Conference Call  
7 attendees

June 15  
Annual Meeting  
Dunkin Donuts Park  
68 registered

June 28  
Strategic Meeting  
Conference Call  
Board Only

June 15  
Annual Meeting  
Dunkin Donuts Park  
68 registered

June 28  
Strategic Meeting  
Conference Call  
Board Only
ANNUAL FORECAST DINNER

Keynote Speaker: Douglas Coté
January 26
Connecticut Convention Center, Hartford
375 attendees

SEMINARS & CONFERENCES

CFA Society Hartford 5K Race
August 4
Bushnell Park
30 Team Members & Volunteers

Fall Investment Conference - Commercial Real Estate: Opportunities and Headwinds
October 25
Guest Speakers: Greg MacKinnon, Ph.D, William E. Wrang III, Joe Accurso, Keith Kockenmeister, Mark Hickey
The Hartford Club, Hartford
48 attendees

Education Luncheon - Structured and Leveraged Notes- Alternatives in Fixed Income
November 9
Guest Speaker: JP Morgan
ON20
21 attendees

Private Wealth Event
January 26
Hartford Club
22 attendees

Education Luncheon - The Case for Commodities
Guest Speaker: Terence P. Brennan
February 22
Flemings Steakhouse
31 attendees

March 16
Guest Speaker: Katherine Roy
31 attendees

Spring Investment Conference - Economic Forum
May 18
Guest Speakers: Robert Cox, Anwiti Bahaguna, Zef Lokhandwalla, ichael S. Falk, CFA, CRS
Hartford Club, Hartford
53 attendees

Putting Investors First Luncheon
“Opportunities and Risks: A Glimpse Into One of the Most Hated Bull Markets”
May 23
Guest Speaker
Hartford Club, Hartford
23 attendees

RECOGNITION, UNIVERSITY & CANDIDATE EVENTS

Charter Recognition Ceremony
November 10
Society Room, Hartford
41 attendees

Research Challenge
9 teams, 6 Universities - 8 teams submitted Research Reports, 3 Finalists, winner UCONN undergrad team
Kickoff - October 20, Hartford Club
Investor Call (People’s Bank) - December 6th
Local Finals - March 8, UCONN Graduate Business Center

UCONN Careers in Finance
No 10, UCONN Graduate Business Center in Hartford- Career Panel with five members of CFA Society Hartford participating

Central Connecticut State University Careers in Investments
February 27, CCSU - Career Panel with five members of CFA Society Hartford participating

William H. Hall High School - Financial Careers Presentation - May 9
Mock Exams - May 20, Elmwood Community Center
In April 2014, the CFA Society Hartford Board and volunteers completed a comprehensive strategy planning session. The goal was to review the mission statement and objectives of the Society, and to develop a three-year strategic plan. The result was a comprehensive set of goals to guide the Board and serve members. The following were determined as priority objectives:

**Enhance the existing program structure to increase member satisfaction.** We believe we can increase attendance at our programs by identifying segments of membership and targeting events to serve each segment. The monthly speaker series program will be given more structure and thoughtful preparation with the goal to attract new attendees. We will try and establish a speaker bank to improve access to quality programming.

**Enhance the Society’s governance by leveraging the experience and skills of our members.** Develop an Advisory Council to provide guidance for strategic issues. This committee will be comprised of Past Presidents and other leaders in our community that can add value to the operations and help advocate for the Society in our region.

**Improve our Volunteer Management Program.** Bring greater definition to the roles and responsibilities available to volunteers. There is a broad array of “jobs” available for all levels of volunteer commitment. We will try to improve matching those openings with willing volunteers, communicating outstanding positions, recognizing a job well done, maintaining a single source of contact information, and improving guidance when needed. We will work on creating a Volunteer Manual.

The Board welcomes new volunteers willing to share their skills for a single event or for ongoing support. There are many skilled and experienced members in the CFA Society Hartford; we encourage you to become a volunteer and share your skills.

The Board plans to hold another comprehensive strategic planning session in 2016.