

ABOUT

Founded in 1955, the CFA Society of Houston is one of the oldest CFA societies in the world. The society promotes the highest professional and ethical standards within the investment community and maintains ongoing educational and certification opportunities for its members. The Society allows individuals with common interests to advance their professional studies and obtain insight into key areas affecting investments.

2020-2021 LEADERSHIP

Jun Gu, CFA
President

Steven Sheldon, CFA
Vice President of Programming

Giovanna Carollo Carter, CFA, CAIA
Treasurer/Secretary

Lee Partridge, CFA
Director

Mahesh Desai, CPA, CFA
Director

John Gualy, CFA
Director

Jason Leder, CFA
Director

Dr. Joe Ueng, CFA
Director

MISSION

To be a strong local community of investment professionals in order to foster the exchange of ideas and knowledge in investment markets, promote the highest ethical standards, encourage members and non-members to earn the CFA designation, provide educational opportunities, and be advocates on issues that serve the interest of investors and society.

EVENTS, PROGRAMS, AND INITIATIVES

- Annual Forecast Dinner
- Weekly Luncheons
- CFA Institute Research Challenge
- Women in Investment Management
- Scholarship Opportunities
- Mentorship Program
- Education Initiatives
- New Charter Award Ceremony
- Webinars and Virtual Events
- Spring/Fall Social
- Networking Happy Hours

1037

Total Members

85%

Male

15%

Female

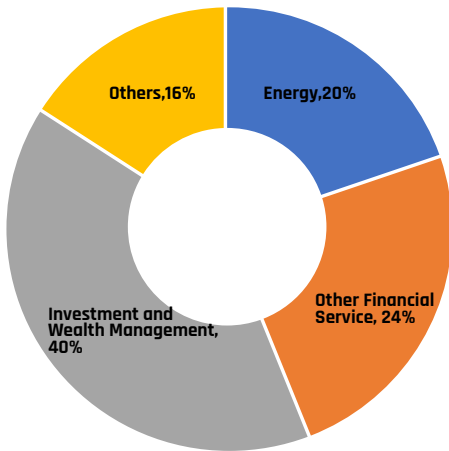
47 Years

Average Age

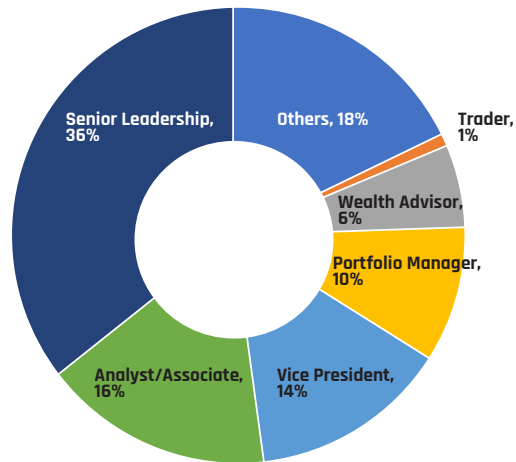


CFA HOUSTON BY THE NUMBERS

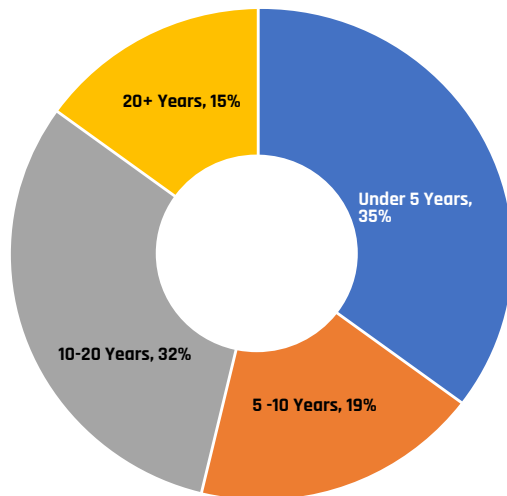
Industry Representations



Job Titles



Member Milestones



Top Employers

- Invesco
- Bank of America
- AIG
- Fayez Sarofim & Co.
- Citi
- BP
- Ernst & Young
- Morgan Stanley
- JP Morgan
- BBVA
- Shell

Contact Us

PO Box 32, Bellaire, TX 77402

Phone: **713.877.1838**

Office@CFAHouston.org

www.cfasociety.org/houston



www.linkedin.com/in/cfahouston

Disclaimer: The above data are based on information provided voluntarily by CFA Houston Society members.