ABOUT CFA INSTITUTE

CFA Institute is a global community of more than 150,000 investment professionals working to build an investment industry in which investors’ interests come first, markets function at their best and economies grow. We develop and promote professional and ethical standards and administer the Chartered Financial Analyst credential, the Certificate in Investment Performance Measurement and the Investment Foundations Program.

There are over 150 CFA societies around the world that support the mission of CFA Institute at a local level and provide members with career growth and advocacy, information exchange and professional networking opportunities.

For more information, visit cfainstitute.org.

ABOUT CFA SOCIETY IOWA

A member society of CFA Institute, CFA Society Iowa promotes the highest ethical standards and professional excellence within the local investment community. Our 450+ members are portfolio managers, security analysts, investment advisors and other financial practitioners. We have served CFA charterholders and CFA Program candidates since 1965.

For more information, visit cfasociety.org/iowa.

ABOUT CFA SOCIETY IOWA MEMBERS

» Average age: 44

» Charterholder status:
  - 95% Charterholders
  - 5% Non-Charterholders

» Job function*:
  - 27% Portfolio Manager
  - 25% Research, Investment or Quantitative Analyst
  - 7% Financial Advisor / Planner / Wealth Manager
  - 5% Chief Investment Officer (CIO)
  - 5% Consultant
  - 5% Corporate Financial Analyst
  - 5% Risk Analyst / Manager
  - 21% Other

» Primary investment practice*:
  - 42% Fixed Income
  - 23% Equities
  - 6% Real Estate
  - 5% Derivatives
  - 5% Structured Products
  - 4% Private Equity
  - 15% Other / Not Applicable

» Primary asset base*:
  - 78% Institutional
  - 22% Private
BENEFITS OF SOCIETY MEMBERSHIP

Society members enjoy a variety of benefits, including:

» Free networking and "Lunch & Learn" events that are open exclusively to members.
» Discounts on our monthly luncheons, annual golf outings and Annual Dinner.
» Free live practice exams, discounts on exam prep materials and CFA program scholarship opportunities.
» Information that helps you stay current on trends affecting the industry in your market.
» Inclusion in a collective voice for protecting the interests of the profession.
» Access to CFA Iowa and CFA Institute resources, including job boards, finance journals and magazines, and other content published by CFA Institute.

MEMBERSHIP TYPES

A CFA Charter is not required for membership in CFA Society Iowa. A Bachelor's degree (or equivalent education/experience) is required for all membership types except student.

» Regular Members are CFA Institute members, have 48 months of approved work experience and have passed Level 1 of the CFA Exam or the Standards of Practice Exam.
» Affiliate Members are CFA Institute members and have less than 48 months of approved work experience.
» Retired Members are CFA Institute members who have changed their status to "retired" with CFA Institute.
» Local Professional Members are non-charterholders who are engaged in the profession but are not members of CFA Institute.
» Candidate Members are registered for Level 1, 2 or 3 of the CFA exam or have an active candidate number.
» Student Members are engaged in full-time studies.

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. You'll develop valuable leadership skills, gain prominence in the investment profession outside your normal work roles and realize additional networking and relationship-building opportunities.

CONTACT CFA SOCIETY IOWA

To find out more, email us at iowacfa@gmail.com or visit:

» cfasociety.org/iowa
» facebook.com/CFAIowa
» linkedin.com/company/cfa-society-of-iowa
» twitter.com/CFAIowa