CFA Society Milwaukee Board would like to thank the entire membership for another full and productive year (fiscal year-ending June 30, 2019). Our society remains strong, vibrant and active on a national and international stage. We are proud of the organization's continued growth and commitment to the highest standards of ethics, financial education and professional excellence. As we move into a new fiscal year, we'd like to share some highlights from the FY 2018-19 year.

We hope you have a wonderful summer and are able to join us for Jazz in the Park on July 25th, our annual Society charity golf outing on August 12th and our yearly Oktoberfest event on August 23rd.

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### Year in Review

#### Conferences and Workshops

- **Americas Regional Leadership Conference in September - Vancouver**
- **Society Staff Training in March - Charlottesville**
- **Society Leadership Conference in May - London**
- **Advocacy Workshop in June - Charlottesville**

Your board and staff was busy participating in meetings and conferences throughout the year the Americas Regional Meeting in October with nearly 80 societies from across the western hemisphere. The Society Leadership Conference was in London this year, and brought together nearly 155 societies from around the world. Each of the major conferences covers numerous topics with presentations from members and staff of the CFA Institute and societies over the course of two to three days. Major themes in 2018-2019 were operational/funding models, the evolution of Institute-Society relationships, and future goals for continuing education. The year finished off with an Advocacy Workshop, lead by CFA Institute staff, which focused on ways to better promote the financial profession, standards and best practices to the industry, regulators and other constituencies.

#### CFA Society Milwaukee Compensation Survey

For the first time in September 2015, we came out with the Compensation Survey to our membership. This initiative was brought to us by our colleagues at the CFA Society Minnesota and received an overwhelming response with nearly 35% of our members participating. We participated again this year along with Madison, Milwaukee, Chicago, and other Midwest societies. The survey has been so well received that there is talk of moving this initiative to the national level. To view the final survey - [click here!](#)

#### New Charterholders Honored at Society Event

In October, 2018, CFA Society Milwaukee honored 25 new CFA charterholders at the Society's annual new charterholder recognition event. New charterholders, their family members and other Society members also enjoyed an evening with Hall of Fame member Green Bay Packer Jerry Kramer. It was a wonderful evening as Jerry discussed inspirations in his life and referred to his critically acclaimed Hall of Fame Speech *You Can, if You Will.*

To view a list of the new CFA charterholders from our area - [click here!](#)

#### Society Hosted 2019 CFA Institute Research Challenge

For the tenth consecutive year, CFA Society Milwaukee in conjunction with CFA Society Madison hosted the local portion of the CFA Institute Research Challenge featuring seven local
The challenge has been a tremendously successful event in providing area students with real-world analysis experience and introducing students to the CFA designation and standards. The winning teams advanced to the Regional Finals in New York.

Participating Universities -
- Carthage College
- Marquette University - Blue Team (Winner of local competition)
- Marquette University - Gold Team
- UW-Eau Claire
- UW-Madison (Winner of local competition)
- UW-Milwaukee
- UW-Oshkosh
- UW-Whitewater - Team 1
- UW-Whitewater - Team 2

We thank the participating companies used for the competition analysis, Duluth Trading Company and Exact Sciences, along with the many Society volunteers. We appreciate all of the support we receive in making the challenge a success.

Financial Literacy / SecureFutures

CFA Society Milwaukee continues to be a strong advocate and supporter of SecureFutures. We routinely have been one of the largest providers of in-class volunteers for the program which provides basic financial literacy to teenagers in Wisconsin. In addition to volunteers, we provide financial support through our CFA Society Milwaukee Foundation along with sponsoring the Secure Futures Investment Conference which was held this year on May 14th and featured Stuart Peterson of ARTIS Ventures.

In August 2016, CFA Society Milwaukee expanded its longstanding partnership with SecureFutures by helping raise money through the Society's Annual Golf Outing. On Monday, August 12th the Society will be hosting its 4th Annual Charity Golf Outing to benefit financial literacy. You can find more information on the event, registration, and sponsorship opportunities by visiting our [website](#).

Branding Activation and Marketing Support Program

We continue to build awareness and "brand value" for the CFA charter. As of this spring through the expanded Society Brand Activation and Marketing Support Program with CFA Institute, we gained access to a full suite of tailored strategic marketing and communication services for our local area in partnership with a public relations firm. In collaboration with the PR firm we developed a marketing plan to assist with increasing member engagement and value with society members, strengthening existing relationships in the investment management community, along with continuing to build awareness and understanding of CFA Society Milwaukee with centers of influence within the investment management community. The funding for this expanded marketing program was made available through a grant from CFA Institute.

A Year of Outstanding Programming

We had a year of outstanding programming with distinguished speakers from all over the world. To view a complete list of speakers and programs - [click here](#)!

In addition to the new charterholder event, we were proud to host our 1st Annual Outlook Dinner in March 18th, VP & CIO of Northwestern University endowment gave a presentation on "Investing for the Long-Run". In addition, we had 11 educational presentations, 6 social/networking events, and we hosted free lunches and an after-party for all CFA candidates taking the exam in June.

Society Details and Demographics

- Established in 1955
- 633 Society Members
- 605 CFA® charterholders
- 46.2 Society Member average age
- 12% Female
- 270 June 2019 Candidates
2019-2020 Board Members

Directors continuing to serve:

- Katie Schoen, CFA, CAIA - President
- Eric Nohelty, CFA - Vice President - President Elect
- Nick Kummer, CFA, CAIA - Vice President - Programming
- Agnes Vongkhamsay, CFA - Treasurer/Secretary
- Jacob Fink, CFA - Director
- Ryan Hamilton - Director
- Brian Leadley, CFA, CPA - Director
- Pete Speidel, CFA, CAIA - Director
- Sara Walker, CFA - Director

The Board welcomes the new board members:

- Kevin Chiappetta, CFA
- Jonathan Dekker, CFA
- Marc Dion, CFA
- Michael Harris, CFA
- Ryan Moran, CFA, CPA, CFP®

Thank you to our departing board members CJ Batchelor, CFA; Erik Gauger, CFA, CFP, CRPS, AIF, QKA; Bill Harrison, CFA, CAIA; and Will Schoyer, CFA for their many years of volunteering.