



CFA Society Milwaukee

About CFA Society Milwaukee

CFA Society Milwaukee promotes the highest ethical standards and professional excellence within the local investment community. CFA Society Milwaukee is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisors and other financial practitioners, that has served CFA charterholders and CFA Program candidates locally since 1955.

Our mission is to lead and grow the investment profession locally by promoting ethical behavior, supporting professional development, and providing fellowship for the benefit of members, candidates, investors, and the community.

Our vision is to have the CFA designation in our region as the leading credential for investment professionals. The combination of a leading credentialing program, exceptional continuing education opportunities, active awareness initiative, and an engaged membership will be our tools in achieving this vision.

CFA Society Milwaukee is a member society of CFA institute. There are 159 CFA societies around the world that support the mission of CFA Institute at a local level and provide members with career growth, information exchange, and professional networking opportunities.

FACTS AND FIGURES

- Number of CFA members globally – over 178,000
- CFA Candidates – 354,300
- CFA Milwaukee Candidates - 354
- Number of local CFA members – 645
- Top occupations of members – Portfolio Manager, Research Analyst
- CFA Society Milwaukee was established in 1963

EVENTS & PROGRAMMING

- Annual Outlook Dinner
- New Charterholder Event
- CFA Institute Research Challenge
- Third Thursday Networking
- Continuing Education Programs
- Annual Golf Outing
- Jazz in the Park Event

INITIATIVES

- Education
- Programming
- CFA Exam review resources
- Financial Literacy Initiative
- Women in Investment Management
- Global Thought Leadership

96%
Chaterholder
Member

77%
Buy-side Professionals
at Institutional Firms

88%
Male Members

12%
Female
Members

47.5
Average Member
Age

BENEFITS OF SOCIETY MEMBERSHIP

As a member of a truly global organization, with a local focus you can:

- Networking with peers worldwide and socialize with industry insiders
- Be part of a collective global voice for protecting the interests of the profession
- Stay abreast of relevant topic and trends that affect the industry in your market
- Take advantage of continuing education opportunities
- Explore CFA Program scholarship opportunities

MEMBERSHIP REQUIREMENTS

Regular Member

- Member of CFA Institute and CFA Society Milwaukee
- 4000 hours of work experience
- Pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct
- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience
- Pass Level 1 of the CFA exam or other such appropriate examination as approved by the Board of Governors, or pass the self-administered Standards of Practice Exam

REFERENCES

Three professional references are required with your application. If one of your references is from a regular member of CFA Society Milwaukee, then only two professional references are required. References from your supervisor(s) are preferred.

VOLUNTEER OPPORTUNITIES

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

JOIN CFA SOCIETY MILWAUKEE

Regular & Affiliate Society Membership Dues: \$100

Regular & Affiliate Professional Leave Dues: \$15

CFA Institute Membership: \$275

For full information please visit our [membership page](#), or to apply for membership, visit [CFA Institute's website](#)



CFA Society
Milwaukee

