



ABOUT CFA SOCIETY NEW MEXICO

CFA Society New Mexico promotes the highest ethical standards and professional excellence within the local investment community. CFA Society New Mexico 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 1998.

The purpose of CFA Society New Mexico is to advance the development of the investment profession and to improve the visibility of the members by supporting professional development and advocating for the New Mexico investing community.

ABOUT CFA INSTITUTE

CFA Institute is a global community of more than 100,000 investment professionals working to build an investment industry where investors' interests come first, markets function at their best, and economies grow. CFA Institute develops and promotes professional and ethical standards and administers the Chartered Financial Analyst credential, the Certificate in Investment Performance Measurement, and the Claritas Investment Certificate. For more information, visit www.cfainstitute.org.

FACTS AND FIGURES

- Over 80 Members in New Mexico
- 41 Candidates took Level I, II or III in New Mexico in 2016
- 200 Local candidates have registered to take a CFA program exam in the last 5 years
- Majority of members have 15+ years of industry experience
- 89% of local members are CFA charterholders



BENEFITS OF SOCIETY MEMBERSHIP

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

- Network 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 topics and trends that affect the industry in your market
- Take advantage of events, speakers, and continuing education opportunities
- Explore CFA program scholarship opportunities

MEMBERSHIP REQUIREMENTS

- **Regular Membership**
 - To become a regular member of CFA Institute & CFA Society New Mexico, you will need to:
 - Hold a bachelor's degree from an accredited institution or have equivalent education or work experience
 - Pass Level I of the CFA exam or pass the self-administered Standard of Practice Examination
 - Have 48 months of acceptable professional work experience in investment decision making
 - Provide professional reference statements
 - Apply for membership to CFA Society New Mexico
 - Agree to adhere to and sign the Member's Agreement and the Professional Conduct Statement
 - Pay annual dues
- **Affiliate Membership**
 - To become an affiliate member of CFA Institute & CFA Society New Mexico, you will need to:
 - Provide professional reference statements
 - Agree to adhere to and sign the Member's Agreement and Professional Conduct Statement
 - Pay annual dues

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. For more information on events and opportunities available within New Mexico, please visit our web site at www.cfasociety.org/newmexico.

Contact Information CFA Society New Mexico

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