



CFA Society  
Orlando

## CFA SOCIETY ORLANDO NEWSLETTER

February 2019

### IN THIS NEWSLETTER

*2019 Annual Forecast Dinner*  
*Our Annual Sponsors*  
*Connect with Us*  
*Upcoming Events*  
*Level 2 – Mentor Program*  
*Past Event Recap*  
*Ethical Decision-Making for Investment Professionals – 1 CE Credit Course*  
*Special Program: Stack Your Acquired Knowledge with the CAIA Designation*  
*New Job Alerts*

### CFA SOCIETY ORLANDO THANKS OUR ANNUAL SOCIETY SPONSORS!

#### Gold Sponsor:

J.P. Morgan Asset Management

#### Silver Sponsors:

BlackRock  
 DePrince, Race & Zollo, Inc.  
 Invesco PowerShares  
 Parametric  
 State Street Corporation

## ANNUAL FORECAST DINNER 2019

REGISTER TODAY AT A DISCOUNTED RATE!

#### FEATURED SPEAKERS



**Mark Yusko**  
 Chief Executive Officer & Chief  
 Investment Officer of Morgan Creek  
 Capital Management



**Marshall Stocker, PhD, CFA**  
 Portfolio Manager & Global Macro  
 Equity Strategist at Eaton Vance  
 Investment Managers

12 February 2019 | 5:30 pm – 8:30 pm  
 Dr. Phillips Center for the Performing Arts  
 DeVos Family Room  
 445 S Magnolia Ave  
 Orlando, FL 32801

REGISTER NOW AT: [cfasociety.org/orlando](http://cfasociety.org/orlando)

We invite you to join CFA Society Orlando at our 2019 Annual Forecast Dinner. Be one of Orlando's local thought leaders and economic professionals to share information and ideas at this elegant dinner.

Member Price - \$60  
 Non-Member Price - \$70  
 Table of 8 - \$675

Register today at [cfaorlando.org](http://cfaorlando.org).

### UPCOMING EVENTS

#### February 12

Annual Forecast Dinner  
 Dr. Phillips Center for the  
 Performing Arts – 5:30 PM

- Mark Yusko, Morgan Creek Capital Management
- Marshall L. Stocker, Ph.D., CFA, Eaton Vance Investment Managers

#### March 20

Structuring Effective Communication  
 The Alfond Inn – 5:45 PM

- Apollo Lupescu, PhD, Dimensional Fund Advisors

For additional event details and to sign up, please visit our [website](http://cfaorlando.org).

### CONNECT WITH US



## ETHICAL DECISION-MAKING FOR INVESTMENT PROFESSIONALS

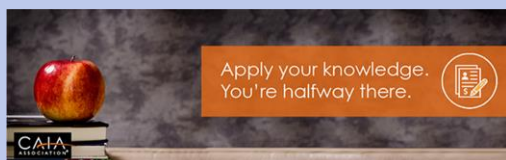


Ethical Decision-Making - Exploring Additional Case Studies. This 60-minute builds on the introductory webinar, using additional case studies to practice applying the framework. CE credit: 1 (SER credit: 1)

February 13, 2019 12:00—1:00 p.m.

[REGISTER HERE](#)

## SPECIAL PROGRAM: STACK YOUR ACQUIRED KNOWLEDGE WITH THE CAIA DESIGNATION



The investment industry is in constant flux. To keep up, you must keep learning and CAIA Association is offering CFA charterholders a unique opportunity to increase their credibility and continue their professional development with the CAIA designation. Eligible CFA charterholders may advance directly to the CAIA Level II exam through a new *pilot program*.

The most robust portfolios cover the entire risk premia spectrum and earning the CAIA designation provides you with knowledge from a specialized curriculum focused on the latest alternative investment practices and strategies.

### Are you eligible?

CAIA Association and CFA Institute are engaged in the shared mission of excellence in investment education, reinforced by the overlap in our respective membership bases. As the alternative investment industry grows, professionals must grow with it.

The minimum criteria for eligibility in the pilot program are as follows. Applicants:

- Must have no existing CAIA exam history
- Must be a CFA charterholder, in good standing, and
- Must have a digital badge, verifiable by CAIA Association.

Questions? Visit <https://caia.org/stackable-pilot> or contact [candidate@caia.org](mailto:candidate@caia.org).

## LEVEL 2 – MENTOR PROGRAM

CFA Society Orlando is pleased to offer a CFA Level 2 Mentor Program to local candidates! The program is designed specifically for Level 2 candidates to assist them with passing the exam, as well as with career development. Please email [education@cfaorlando.org](mailto:education@cfaorlando.org) to apply or for more information about the program.

## PAST EVENT RECAP

### Discovering Phi: Motivation as the Hidden Variable of Performance

CFA Society Orlando recently held our Discovering Phi event on November 14<sup>th</sup> where featured speaker, Philip Palanza, revealed how firms could leverage motivation to achieve better financial outcomes for their clients.



Douglas R. Glennon, CIMA, Christine Lindquist & Philip Palanza

### Global Market Update Breakfast

On January 17<sup>th</sup> Philip Camporeale, Managing Director at J.P. Morgan Asset Management, led an interactive discussion about the market heading into 2019.



Philip Camporeale

## NEW JOB ALERTS

Looking for a new job? We are now including recent job postings in our quarterly newsletters, see more open positions on our [Job Board](#).

<p><b>Controller</b> Hillpoint Winter Park, FL</p>	<p><b>Business Advisory Services – Senior Manager/Manager</b> Vestal &amp; Wiler CPAs Orlando, FL</p>	<p><b>Wealth Advisor</b> WaterOak Advisors Winter Park, FL</p>
------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------

If you are seeking candidates for an investment-related position in Central Florida that you would like to advertise on our Job Board, please email [careerservices@cfaorlando.org](mailto:careerservices@cfaorlando.org).