The CFA Society Orlando is a member of the CFA Institute Global Network of Societies who's mission is to lead the finance profession in Central Florida by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

### LEADERSHIP
**OFFICERS**
- Steve Curley, CFA, President
- Frank Garcia, CFA, Vice President
- Zach Knope, CFA, Treasurer
- F. Javier Perez, CFA, Secretary

**BOARD OF DIRECTORS**
- Chris Cannon, CFA
- Zac Chichinski, CFA
- Tom Dolatowski, CFA
- Jeffrey Goll, CFA
- Vivien Johnson, CFA
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- Pierce Timko, CFA

### ABOUT US
#### MISSION
The CFA Society Orlando strives to deliver a diverse line-up of high caliber speakers and local networking events. In 2018, the Society hosted 10 events, including: our annual volunteer appreciation social, 5 informative programs/panels, a new candidates social, an end of year member's social, and our Annual Forecast Dinner at the Dr. Phillips Center for the Performing Arts.

#### STATISTICS
(as of 01/01/20)
- **211** Active members
- **93%** Charterholders

#### Top 5 job functions
- **23%** Portfolio Manager
- **16%** Research Analyst
- **13%** Consultant
- **10%** Financial Advisor
- **5%** Professor

#### Top 5 employers represented
- AndCo Consulting, LLC: 13
- Charles Schwab & Co, Inc.: 7
- The Newport Group, Inc: 6
- Ceredex Value Advisors LLC: 6
- BNY Mellon Wealth Management: 5

### GET INVOLVED
Volunteering helps you contributing to the local investment community as well as influence the direction of CFA Society Orlando and its programs.
Here are a few ways to get involved today:
- Attend an event
- Be a Mentor (Level 2 Mentor Program)
- Become a Board Committee Member
- Post a job (free job board for employers)
- Become a Sponsor (Annual or event)
- Teach financial literacy
- University volunteer opportunities
- Speaking opportunities (Event, Podcasts)

### EVENTS
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### MEMBERSHIP
Membership is open to CFA charterholders and candidates enrolled in the CFA Program who are actively pursuing the Chartered Financial Analyst designation. Dues are $75 annually for regular and affiliate members. Membership benefits include: professional development, advocacy, networking opportunities, and education.
ABOUT CFA INSTITUTE

MISSION
CFA Institute is a global community of investment professionals working to build an investment management industry where investors' interests come first, financial markets function at their best, and economies grow.

We advocate for financial market integrity and develop and promote ethical and professional standards, such as the Global Investment Performance Standards (GIPS®) and the Asset Manager Code of Professional Conduct™, and our members uphold our industry-leading Code of Ethics and Standards of Professional Conduct.

CFA INSTITUTE STATISTICS
• Fewer than 1 in 5 candidates who begin program successfully earn the CFA Charter
• More than 154,000 CFA Charterholders globally
• More than 450,000 members in 165 countries
• 151 local societies worldwide
• Global Investment Performance Standard (GIPS®) championed locally in more than 46 countries

BECOMING A CHARTERHOLDER
The Chartered Financial Analyst (CFA) credential is the most respected and recognized investment management designation in the world. The curriculum covers academic theory, current industry practice, and ethical and professional standards to provide a strong foundation of advanced investment analysis and real-world portfolio management skills. A work experience requirement and an annual ethics statement ensure career-long professional excellence by those who have earned the CFA Charter. To find out more about the CFA Charter, please visit www.cfainstitute.org/cfaprogram.