

OVERVIEW

CFA Society Philippines is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisers, and other financial practitioners, that has served CFA® charterholders and CFA® Program candidates locally since 1997.

CFA Society Philippines promotes the highest ethical standards and professional excellence within the local investment community.

MISSION

To lead in improving the quality and standards of the financial profession by offering educational programs, creating awareness of the significance of the CFA designation among various constituent groups, being an advocate on behalf of industry issues, and encouraging ethical behavior for the ultimate benefit of the Philippine society.

VISION

To be recognized institution in the finance industry with members who are known for their integrity and professional excellence.

For more information, you may visit www.cfaphilippines.org.

CFA® PROGRAM BENEFITS

Achieve the highest distinction in the investment management profession – the Chartered Financial Analyst® (CFA) designation.

The Chartered Financial Analyst® (CFA) credential is held by over 150,000 professionals around the world. The charter gives a strong understanding of advanced investment analysis and real-world portfolio management skills.

The CFA Program is a self-study program divided into three levels of exams. Passing these exams is one step to becoming a CFA charterholder.

Invest in your career now to gain benefits for a lifetime.



Gold Standard

The CFA charter equips you not only to enter the profession, but also to excel at all stages of your career.



Strong Ethical Foundations

Gain confidence and clarity in navigating ethical issues.



Global Passport

Earn waivers from regulatory agencies, graduate programs, and more.



Unmatched Expertise

Our rigorous curriculum will equip you for complex investment decisions.



Prestigious Network

Connect with an exclusive group of outstanding investment professionals.



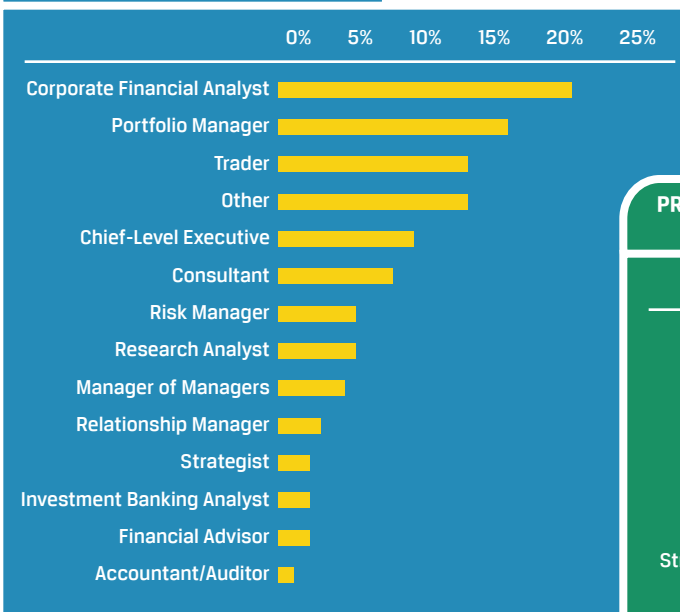
Career Resources

Gain access to career guides, thought leadership, and continuing education.

For more information, you may visit <https://www.cfainstitute.org/programs/cfa>

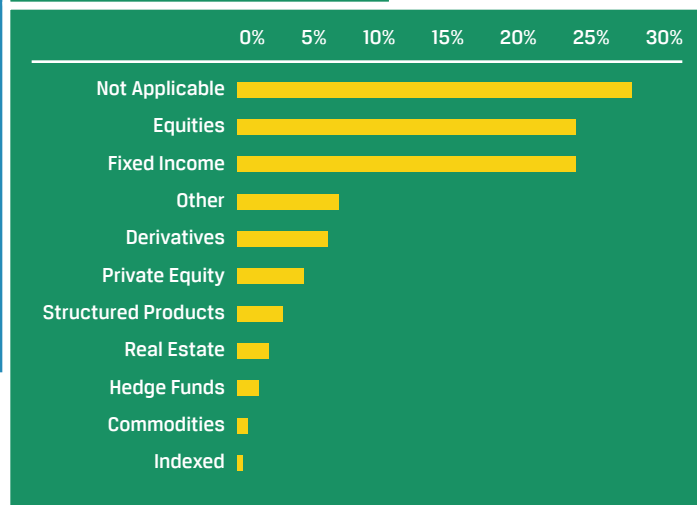
MEMBER JOB FUNCTIONS

As of 31 August 2018

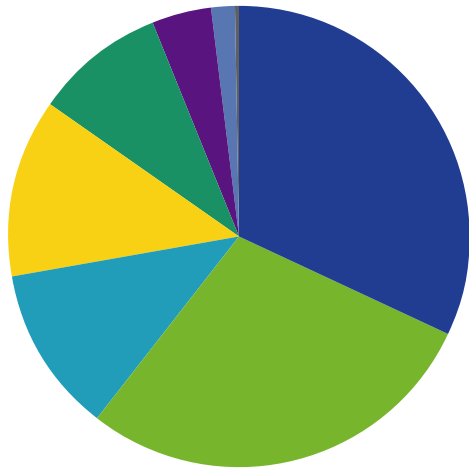


PRIMARY INVESTMENT PRACTICE

As of 31 August 2018



LOCAL MEMBERSHIP AGE RANGE



26 - 30 (31.7%)
 31 - 35 (28.2%)
 36 - 40 (11.5%)
 41 - 45 (12.3%)
 46 - 50 (9.1%)
 51 - 55 (4.0%)
 56 - 60 (1.6%)
 61 - 65 above (.16%)

FLAGSHIP PROJECTS

- **Continuing Professional Development:** Our continuing education program that offer members and other investment professionals technical expertise and industry knowledge to stay current to the demands of the ever-changing investment world and serve their clients with increased competence.
- **Prestige Night:** The annual Charter Award Ceremony where new CFA charterholders are recognized for completing the CFA Program.
- **Prestige Awards:** The recognition program where CFA Society Philippines awards the Outstanding Charterholder of the Year and Most Promising Charterholder of the Year.
- **CFA Institute Research Challenge:** The annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis. team writes a research report on their assigned company with a buy, sell, or hold recommendation and may be asked to present and defend their analysis to a panel of industry professionals.
- **Philippines Investment Conference:** The international conference staged every other year since 2014 by the CFA Society Philippines where delegates get to hear from business leaders, economists, institutional investors and many others.
- **Philippine Junior Finance and Investment Conference:** Inaugurated in 2013 and reached out to around 14,000 student, this is a one-day conference and exhibition catered for students and young professionals who want to advance their personal career and financial wellness.
- **Best Managed Funds of the Year:** Launched in 2016 with the main intention of promoting financial education among retail investors and to provide a platform that will allow for a uniform performance comparison across various pooled funds in the country.

LOCAL MEMBERSHIP BENEFITS

- ✓ Receive free seats for seminars;
- ✓ Enjoy big discounts to Continuing Education workshops presented by acclaimed industry leaders;
- ✓ Network with fellow CFA charterholders and financial insiders to stay abreast of local industry trends through events organized by CFA Society Philippines;
- ✓ Attend presentations by local and foreign experts to help you stay up-to-date with contemporary topics in the financial industry;
- ✓ Receive job alerts through the CFA Society Philippines' job postings;
- ✓ Be featured as a subject-matter expert in different media channels and
- ✓ Get involved by joining the Society's Board of Directors and help shape a trustworthy, forward-thinking financial industry that better serves our society;

LOCAL SOCIETY LEADERSHIP

Chairman & President	Cristina P. Arceo, CFA China Banking Corporation
Trustee and VP for Academic Relations	John C. Balce, CFA FTI Consulting Philippines, Inc.
Trustee and VP for Candidate Relations	Edmund C. Lee, CFA Caylum Trading Institute
Trustee and VP for Continuing Education	Mari Toni S. Bautista, CFA Standard Chartered Bank
Trustee and VP for Industry Relations	Robert B. Ramos, CFA EastWest Banking Corporation
Trustee and VP for Member Relations	Alessandra Araullo-Gonzalez, CFA ATR Asset Management
Trustee and Treasurer	Erwin O. Avante, CFA First Gen Corporation
Corporate Secretary	Julio P.G. Bucoy, CFA ATR Asset Management
Assistant Corporate Secretary	Donald Onghanseng Insights Philippines Legal Advisors

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 CFA Society Philippines

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