

## MEMBERSHIP FAST FACTS

- Our over 500 members are represented across 140 organizations.
- Our members average nearly 20 years of experience.
- More than 180 members manage institutional assets.
- Over 140 members are in private wealth management.
- Our top five employers include Federated Investors, BNY Mellon, PNC Financial Services, C.S. Mckee and Wilshire Associates.
- Top reported job functions include:
  - Portfolio Managers (35%)
  - Research Analyst (15%)
  - Investment Consultant (11%)
  - Chief Level Executive (10%)

## LEADERSHIP

### President

George Emanuele, CFA, CFP, CMT

### Vice President

Jim Herrington, CFA, CAIA

### Treasurer

Joe Lantz, CFA, CAIA

### Secretary

Jody Madala, CFA

### Membership Outreach

Brad Jones, CFA, EA

### Programs

Lisa Brignoni, CFA

### Special Events

Josh Armstrong, CFA

### University Outreach

Gene Natali, CFA

### Executive Administrator

Caryn Loehr

## OVERVIEW

CFA Society Pittsburgh was formed in 1957 and is a chapter of the CFA Institute (CFI). ***The mission of the Society is to lead the regional investment profession by providing educational and career development opportunities for members, investment professionals, and the community.*** The Society pursues this mission by actively promoting ethical and professional standards within the investment industry, encouraging professional development through the Chartered Financial Analyst (CFA) Program, and by facilitating the open exchange of information and opinions. The CFI is a global organization that awards the CFA charter and leads the investment industry by setting the highest standard for ethics and professional excellence while vigorously advocating for professional development and a fair capital markets system.

## WHO WE ARE

The CFA Society Pittsburgh has over 500 members of which 95% hold the CFA designation. Additionally, each year we have over 300 candidates pursuing this prestigious designation. The CFA designation is often considered the “gold standard” in the investment management industry. Our members are frequently the key decision makers at their firms and work in diverse areas of investment management and finance, including institutional portfolio management, investment consulting, plan sponsors, private wealth management, hedge funds, private equity, corporate finance, and academia. We also periodically partner with other local professional organizations, have educational partnerships with universities, and a financial literacy campaign.

## PROGRAMS AND SPECIAL EVENTS

The following are just an example of some of our most notable programs:

- We host monthly educational luncheons incorporating industry experts, market strategies, economists, government officials, academics, and corporate executives
- Annual Meeting & New Charter Awards Ceremony
- Endowments & Foundations Conference
- Financial Literacy Campaign and Competition
- Investment Research Challenge
- Market Outlook Dinner
- Social & Networking Events
- Stock Pickers Luncheon
- CFA Exam Preparation Programs

LEARN MORE AT [www.cfapittsburgh.org](http://www.cfapittsburgh.org) OR [info@cfapittsburgh.org](mailto:info@cfapittsburgh.org)

