

MEMBER SURVEY RESULTS

2017-2018 FISCAL YEAR

April 2018

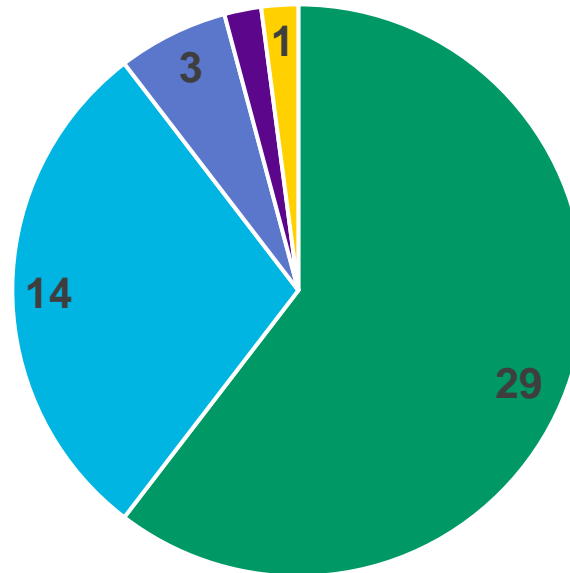


**CFA Society
Pittsburgh**



THE VAST MAJORITY OF MEMBERS ARE SATISFIED WITH THEIR MEMBERSHIP

Overall, are you satisfied with your membership in the CFA Society Pittsburgh?

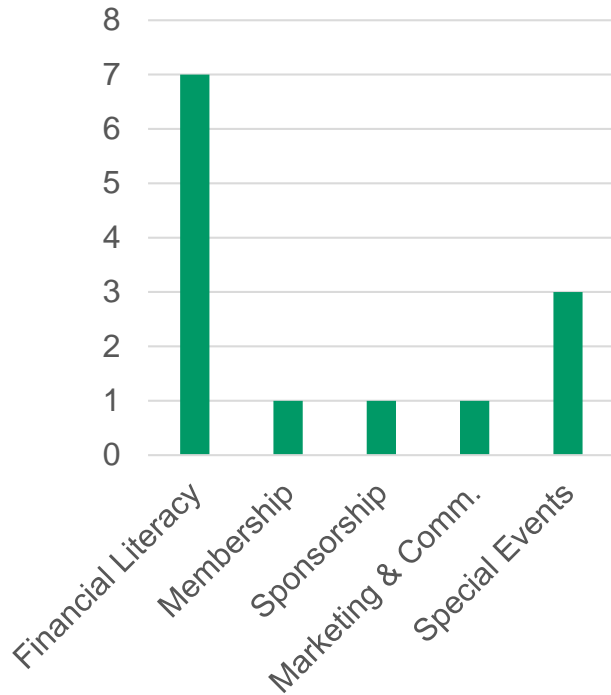


■ Yes ■ Mostly ■ Somewhat ■ No ■ Slightly

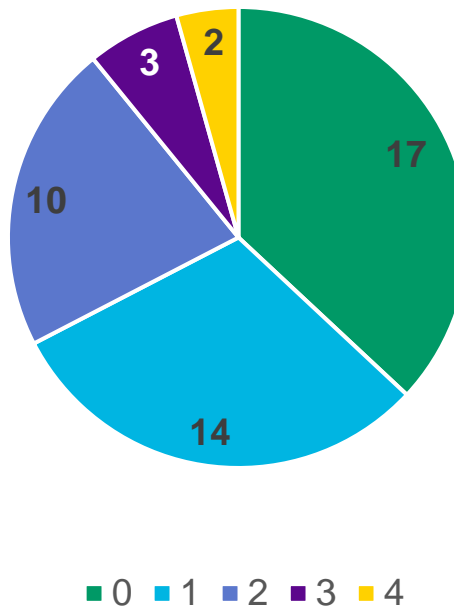
Approximately 90% of respondents are at least mostly satisfied with their CFASP membership

COMMUNITY ENGAGEMENT IS HIGH

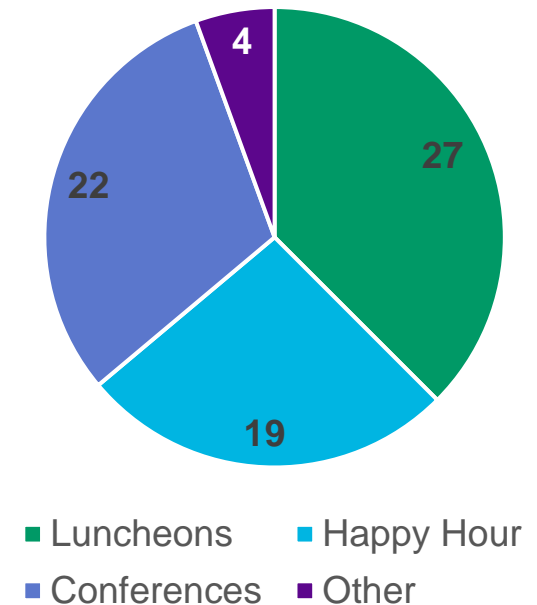
Are you currently a member of one of the CFA Society Committees?



How many CFASP special events did you attend in the past 12 months?



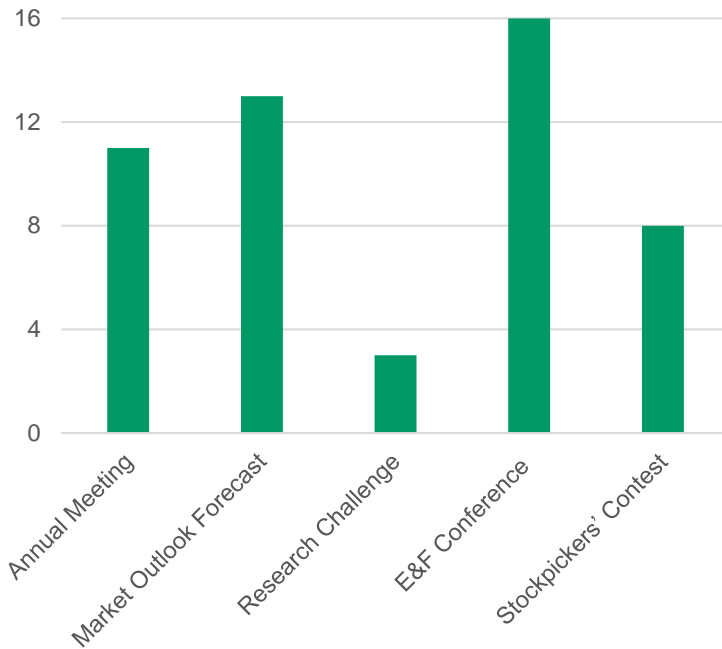
What networking events are most effective to you?



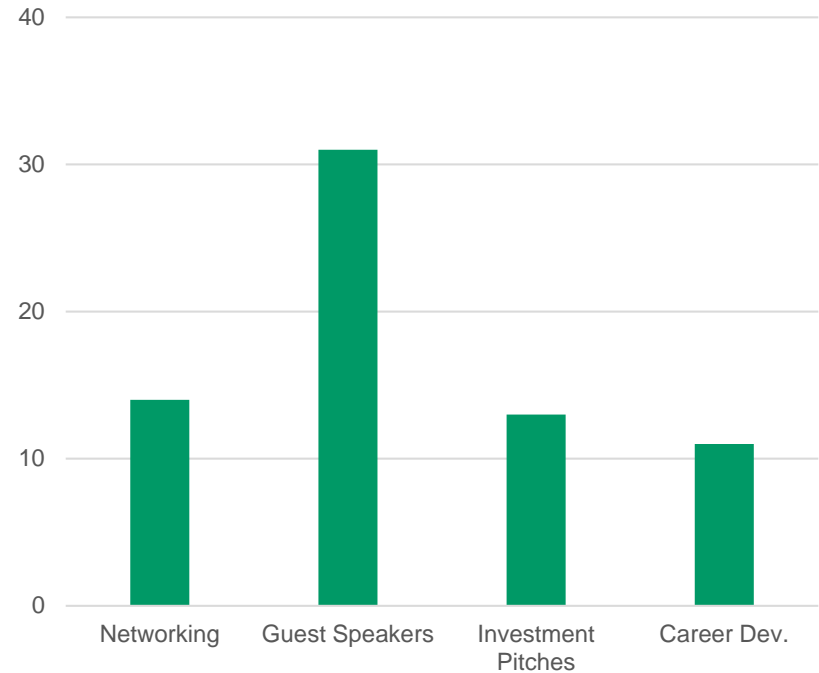
Approximately 30% of respondents are involved in at least one committee, and most attended at least one special event

EVENTS

Which CFASP special events did you attend?



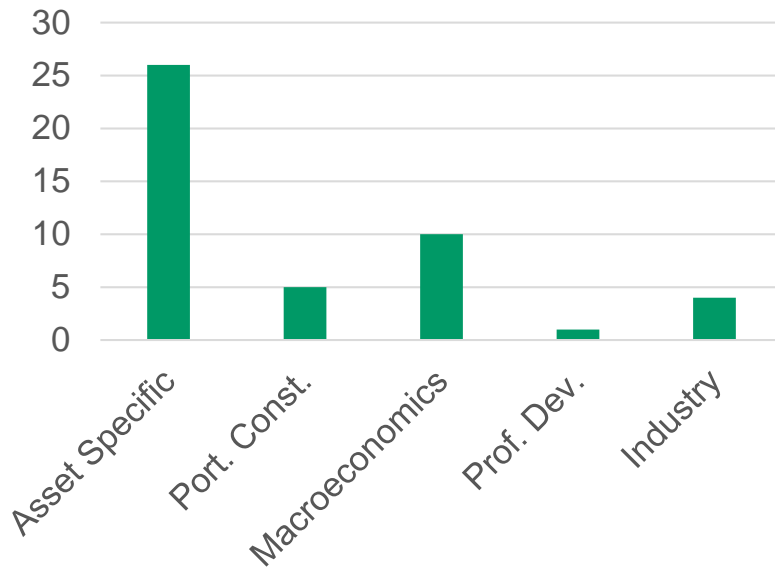
What events would you like to see more?



Guest speakers and conferences are the most popular events

MONTHLY LUNCHEONS

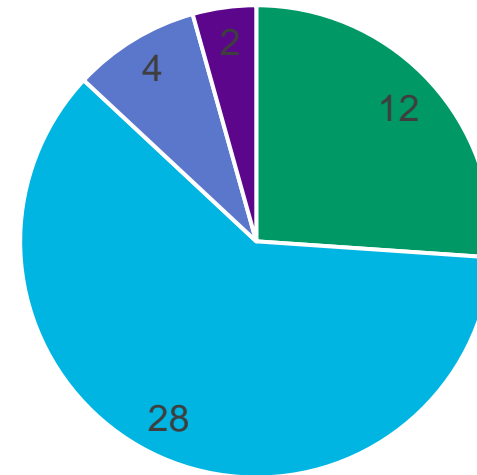
What topics are you most interested in?



Other suggested topics

- Options
- Professional Ethics
- Company Presentations
- Alternative Assets
- Investment Strategies
- Technical Analysis

How often do you attend the CFA Society Pittsburgh's monthly luncheon events?

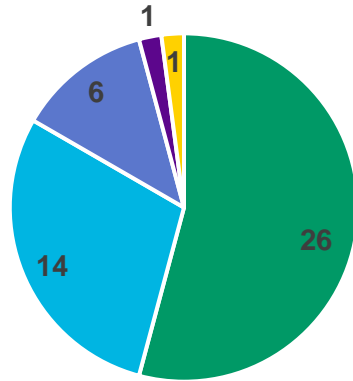


■ Somewhat ■ Not Very ■ Very ■ Never

Approximately half of respondents attend monthly luncheons regularly, with the greatest interest in asset-specific discussions

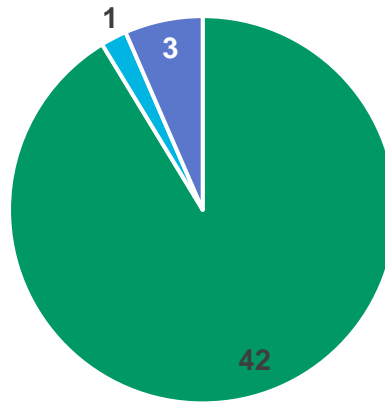
MEMBERSHIP OUTREACH

Are you satisfied with the current level of member outreach and engagement with the CFA Society Pittsburgh?



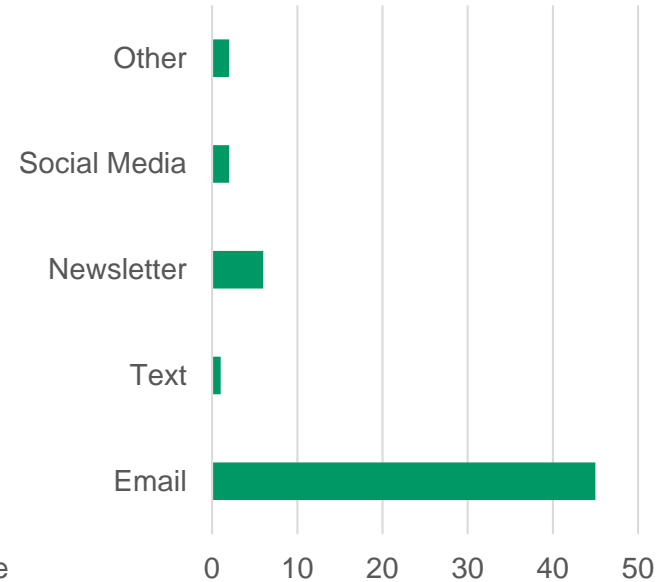
■ Yes ■ Mostly ■ Somewhat
■ No ■ Slightly

In 2016-2017 fiscal year, would you like more, about the same, or less communication from the CFA Society Pittsburgh?



■ About the Same ■ Less ■ More

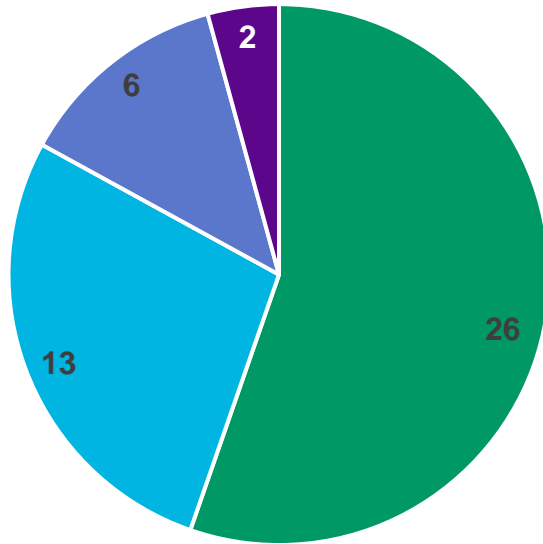
What is your preferred method for receiving communications from the CFA Society Pittsburgh?



The majority of membership is happy with the current level of outreach

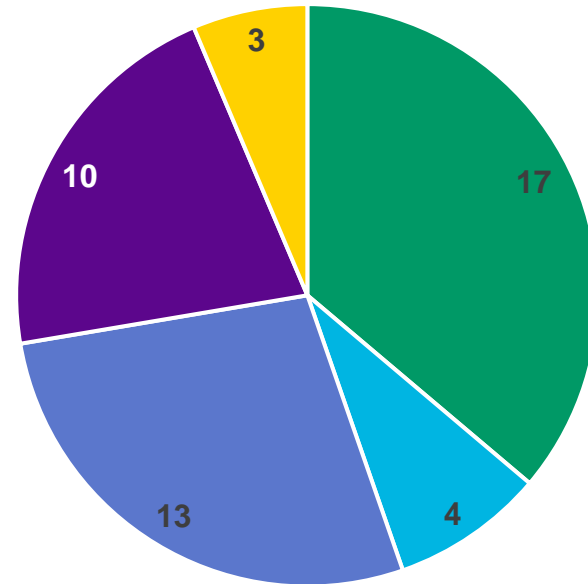
BRAND AWARENESS

How important to you is promoting the CFA Charter?



■ Very Important ■ Important
■ Somewhat Important ■ Slightly Important

Are you satisfied with the current level of awareness of the CFA Charter within the Western PA area?

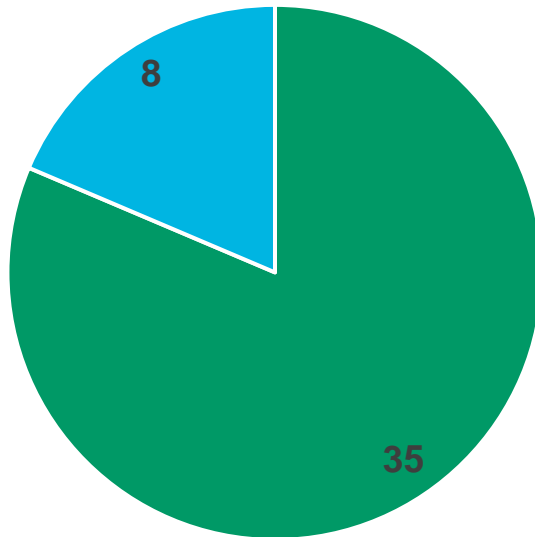


■ Mostly ■ Slightly ■ Somewhat ■ Yes ■ No

Respondents commonly cited an opportunity to improve brand awareness with clients and fields outside of investment management

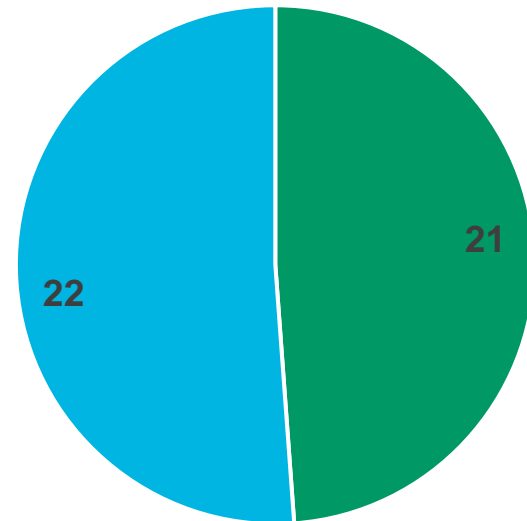
JOBLINE

Are you aware of the CFA Society Pittsburgh's "Jobline" job board, specifically for our local members?



■ Yes ■ No

Have you or your firm used the CFA Society Pittsburgh's Jobline to search for new opportunities or candidates?



■ Yes ■ No

While most members are aware of Jobline, most have not utilized it, typically because of no hiring needs

PROFESSIONAL DEVELOPMENT

How else could the CFA Society Pittsburgh support your professional development and networking efforts in Western PA?

- Broaden audience for events to include non-charterholders
- Partnerships with local investment firms
- Golf events for networking
- Internal mentorship program
- Scheduling some events on weekends
- Greater outreach to undergraduate and graduate business programs
- Focus on increasing the diversity of membership
- Co-host events with other financials organizations
- Expand focus outside traditional investment management
- Hold events outside downtown Pittsburgh
- Leverage membership for access to research & educational materials