



MEMBERSHIP FAST FACTS

- Our over 480 members are represented across 140 organizations.
- Our members average more than 20 years of experience.
- More than 160 members manage institutional assets.
- Over 130 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 (36%)
 - Analyst (15%)
 - Investment Consultant (11%)
 - Chief Level Executive (10%)

LEADERSHIP

President

Greg Filbeck, CFA,FRM,CAIA

Vice President

George Emanuele, CFA

Treasurer

Joe Lantz, CFA,CAIA

Secretary

Jim Herrington, CFA, CAIA

Membership Outreach

Cale Grove, CFA

Programs

Chris Wiles, 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 (CFAI). ***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 CFAI 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 460 members of which 93% 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 OR info@cfapittsburgh.org