ARE WE MEETING OUR MISSION?

**Is the CFA Society Pittsburgh effectively supporting the mission of the CFA Institute?**

- Yes: 26
- Mostly: 13
- Somewhat: 1
- Slightly: 1
- No: 1

**Is the CFA Society Pittsburgh effectively meeting its mission?**

- Yes: 28
- Mostly: 11
- Somewhat: 1
- Slightly: 1
- No: 1

In general, CFA Society Pittsburgh is meeting both its mission and that of the CFA Institute.
AND THE VAST MAJORITY OF MEMBERS ARE SATISFIED WITH THEIR MEMBERSHIP

Overall, are you satisfied with your membership in the CFA Society Pittsburgh?
WE ARE BUILDING THE COMMUNITY, BUT CAN STILL SERVE IT BETTER

Do you feel that the CFA Society Pittsburgh is actively promoting the financial community in Western PA?

Are there any subject areas (professional development, exam preparation, special events, networking/social events, etc.) we should emphasize more? Any that we should emphasize less?

- 13 of 41 responses mentioned they’d like to see more networking / social events
  - 3 responses mentioned targeted or industry-specific events (e.g. energy)
- 6 responses mentioned more professional development opportunities, though no specifics were given
- A few responses mentioned they’d like to see panels of current members discussing topics

Many members would like more networking / social events, especially after the work-day or during the evening
MONTHLY LUNCHEON TOPICS

What topics would you like to see more addressed at future monthly luncheons?

Other topics?

• Building / Growing an institutional asset management firm
• Banking industry
• Current issues (e.g. fixed income in today’s portfolios)
• Asset Allocation
• Trust / Succession Planning
• Quantitative Finance / Program Trading

There is interest in macroeconomics, equities, and alternative assets for monthly luncheon topics
Are you satisfied with the current level of member outreach and engagement with the CFA Society Pittsburgh?

- Yes: 22
- Mostly: 14
- Somewhat: 3
- Slightly: 1
- No: 1
- No Response: 3

In 2015, would you like more, about the same, or less communication from the CFA Society Pittsburgh?

- More: 1
- About the Same: 2
- Less: 5
- No Response: 33

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

- Email: 30
- Telephone: 20
- Website: 10
- Newsletter: 5
- Facebook: 2
- Video: 1
- Other: 0

The majority of membership is happy with the current level of outreach.
While promoting the CFA Charter is important, most agree we should work to increase awareness of the Charter in laypeople.
Most participants believe emphasizing greater knowledge and career opportunities at universities will help build awareness of the CFA.
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PROFESSIONAL DEVELOPMENT

Is the CFA Society Pittsburgh meeting your local professional development needs and priorities?

- Yes: 17
- Mostly: 5
- Somewhat: 2
- Slightly: 7
- No: 1
- No Response: 9

Are the CFA Society Pittsburgh’s offerings and events relevant to your career?

- Yes: 13
- Mostly: 7
- Somewhat: 3
- Slightly: 8
- No: 10
- No Response: 0

What topics would be most relevant for your continuing education efforts?

- Portfolio Theory: 15
- Equity: 10
- Debt: 5
- Estate Planning: 0
- Ethics: 0
- Alternative Assets & Real Estate: 5

Members would like to focus on Portfolio Theory and Equity for professional development programs.