



CFA SOCIETY OF SACRAMENTO

GLOBAL NETWORK, LOCAL PRESENCE

ABOUT CFA SOCIETY OF SACRAMENTO

Founded in 1991, the CFA Society of Sacramento operates as member Society of CFA Institute. Our membership consists of over 130 regional investment professionals and academics. Our members work in both the public and private sectors in a broad range of capacities: Chief Investment Officers, Portfolio Managers, Investment Management Consultants, Financial Analysts, Chief Financial Officers, Economists, Educators, Valuation Experts, Corporate Governance Experts, and more.

MISSION STATEMENT

Our mission is to utilize our collective investment knowledge, expertise and global professional network in order to function as a valuable resource to our members and to benefit our regional community.



BENEFITS OF MEMBERSHIP

Our Society fulfills its mission by:

- Providing unparalleled opportunities for professional education for our members and their guests
- Promoting the prestige and value of the CFA charter to our community
- Creating forums for professional networking and social activities
- Providing significant study assistance to regional candidates in the CFA Program
- Serving as an employment resource for regional investment professionals and employers

ABOUT CFA INSTITUTE

A global membership organization that awards the CFA designation, CFA Institute leads the investment industry by setting the highest standards of ethics and professional excellence and vigorously advocating fair and transparent capital markets.

Anchored by the CFA® examination and study program, and nearly 130 Member Societies around the world, CFA Institute is a volunteer-driven organization whose members are employed as securities analysts, portfolio managers, strategists, consultants, educators, and other investment specialists. These professionals practice in a variety of fields, including investment counseling and management, banking, insurance, and investment banking and brokerage firms.

Through offices in the United States, the United Kingdom, and Hong Kong, CFA Institute manages programs and services on behalf of more than 200,000 investment professionals (members and CFA candidates) around the world. For more information on the CFA Program or CFA Institute, please visit www.cfainstitute.org.

HOW TO JOIN

You may join our Society by applying for membership with CFA Institute. Two sponsors are required (one Regular member of CFA Institute and your supervisor, one of which must be a member of our Society. If the supervisor requirement cannot be met then an additional sponsorship by a Regular CFA Institute member is required). There are two types of active membership in our Society: Regular and Affiliate. To qualify as a Regular member, you must have 48 months of acceptable work experience practicing or teaching the investment decision-making process. If you do not have the required amount of experience yet, you can join us as an Affiliate member.

It is important to note that you do not have to pursue the CFA charter to become a member of either organization. Once your application is approved, you will be contacted by our Vice President of Membership for a welcome orientation to our Society.

For further information and application forms, please visit our website: www.cfass.org