

# NEWSLETTER

FALL 2016

## PRESIDENT'S WELCOME



Dear Fellow Members,

On behalf of our Board of Trustees, dedicated staff, and generous volunteers, I wanted devote some time focused on you: the members of CFA Society Seattle. You are the entire reason for our existence. It is your interests that we serve with each decision we make. We dedicate 100% of our time and energy to providing value to you, both this coming year and over a long time horizon. Every year you have a choice of whether or not to renew your membership with us. We thank you for the continued confidence you place in us each time you do so.

The society leadership devoted a significant amount of time over the last year to redefine

our mission and vision in context of our strategic objectives.

Our mission is *to advance our members' investment knowledge and careers by providing educational and networking opportunities, while promoting the CFA charter and investment ethics in the Puget Sound region.*

Our vision is to establish a *trusted community of knowledgeable investment experts in the Puget Sound region.*

Using these statements to guide us, we have developed a three-year plan to transform our board from an operational board to a strategic board. We want to pull the board members out of the day-to-day operations and have them focus on strategic planning and decision making.

Why does this matter, you may ask? This pivot is an important step because a strategic board is much better positioned to ensure that the interests of the members are served over a long time horizon. Our environment is rapidly changing and our ability to meet the future needs of our members will depend on how far out we can plan and how much energy we can focus on those plans.

While planning for tomorrow, we can't neglect our responsibility to deliver value to you, today. We have over a dozen committees that fall into three broad categories—educational,

networking, and general committees. Our First Vice President, **Matt Griffith, CFA**, is leading our efforts with the Networking Committees. **Thomas Garrett, CFA**, our Second Vice President, is heading up our educational effort through the Programming Committee. All other committees, including Membership, University Relations, and Employer Outreach work more directly with other board members.

We are aiming to provide a board range of activities, all with the same key objectives in mind: raise the profile of the CFA charter in our local market, grow our membership base and market penetration in the local investment industry, and increase our member participation.

Alignment between the society's activities and the members' interests is critical in delivering better member value. If you have any suggestions for how we can provide better value, please reach out to our Volunteer Recruiting Chair, **CJ Hall, CFA**, and help make it happen.

I hope to see you at our **New Charter Ceremony and Holiday Party** on December 15th and our annual **Economic Forecast Dinner** on January 19th.

Best regards,

Dylan Kelly, CFA  
President | CFA Society Seattle

## SEATTLE JOB BOARD

The CFA Society Seattle Job Board connects talented financial professionals with employers throughout the Pacific Northwest.

The job board remains **FREE** to job seekers and employers. CFA member companies pay only \$250 for a 30-day posting. Non-CFA member companies pay \$350.

Job seekers and employers can [click here](#) to learn more and get connected.



## 2017 MEDIA BOOK

As an exclusive privilege to the CFA Society Seattle members, we provide this free media platform to share your industry

insight and expertise with members of the press. The CFA Society Seattle media book helps local and national journalists and media entities in identifying qualified practitioners for their views and commentary on their area of expertise.

Scheduled for electronic distribution to coincide with the 2017 Annual Economic Forecast Dinner, the deadline for submitting your profile information is Thursday, December 1, 2016.

To secure your presence in the 2017 edition, please **complete this form**.





**CFA Society Seattle  
2016 Volunteer of the Year  
SHERRIE TRECKER, CFA**



**Ben de Fiebre:** Sherrie, thanks for taking the time to sit down with me, I'm sure you're very busy. First, let me say congratulations on being recognized as CFA Society Seattle's Volunteer of the Year. I'm going to jump right into it: tell me a bit about yourself and what you did before CFA Society Seattle.

**Sherrie Trecker:** Community service has always been a passion of mine. I started volunteering in high school, through Key Club, where I eventually held a district-wide leadership role. When I moved to Seattle in 2011 I was looking for new opportunities to volunteer in the community. I sought out multiple opportunities with multiple organizations, and CFA Society Seattle was one that stuck! (The other is the Seattle Mountaineers, where I spend countless volunteer hours leading climbs as well as climbing courses.)



**de Fiebre:** How did you get involved as a volunteer?

**Trecker:** The Young Professionals Network was looking for people to volunteer to lead events throughout the year and I jumped on the opportunity. The next year, I was the Chair of the Young Professionals. It was a great group because it allowed me to engage with

students and young professionals in finance, providing them with the tools they need to decide if the CFA charter is right for them.



**de Fiebre:** What have you found to be the most rewarding part of volunteering this year?

**Trecker:** As I gained more experience (aka I got older), I felt like I no longer accurately represented a "young professional." CFA Society Seattle is nimble enough that they allowed me to shift my focus to a different demographic: women in finance. In 2016 I was able to harness my passion for improving gender diversity in finance into a half day conference, co-hosted by CFA Society Seattle and Russell Investments. We plan to hold the event annually, and have also developed a new CFA Society Seattle Women's Network, to support an avenue for CFA Society Seattle members other than myself to have an impact on gender issues.



**de Fiebre:** How can our other members get involved like you have?

**Trecker:** CJ Hall, CFA is our volunteer coordinator and he is a great resource! We are always looking for people to lead events and do behind-the-scenes volunteer work. My biggest piece of advice is to take on a role that might stretch you a little; it is where you will find the most personal growth.

**de Fiebre:** Sherrie, congrats again and thank you for your time.

**SPECIAL THANKS**

Thank you to Dylan Kelly, CFA and Ben de Fiebre, CFA for contributing this story.  
Thank you to Kim Barlow | REAL PORTRAITS and Sherrie Trecker, CFA for sharing these photo images.



## SAVE THE DATE

Visit [cfaseattle.org](http://cfaseattle.org) to learn more about CFA Society Seattle programs and area events.

**Tuesday, October 4, 2016 | 9 PM – 4 PM**

Finance Expo 2016 at the World Trade Center | 121 SW Salmon Street Portland, OR 97205

Presented by the CFA Society Portland in partnership with the CFA Institute

**No Charge to Attend! [REGISTER HERE](#)**

**Tuesday, October 11, 2016 | 1:00 PM – 2:30 PM**

"Pieces to the Puzzling Puzzle" presented by Marvin Loh

The Rainier Club 820 4th Ave. Seattle, WA 98104

**Thursday, October 20, 2016 | 1:00 PM – 2:30 PM**

"Incorporating Market Lending into an Institutional Portfolio Framework" presented by RiverNorth Philip Bartow

The Rainier Club 820 4th Ave. Seattle, WA 98104

**October 20 to 21, 2016**

CFA Institute Conference: Fixed Income Management 2016

Hyatt Regency - Huntington Beach Resort - California

**Tuesday, November 15, 2016 | 1:00 PM – 2:30 PM**

"From Deflation to Negative Rates and Back to Inflation Again" presented by David Ranson

The Rainier Club 820 4th Ave. Seattle, WA 98104

**November 17 to 19, 2016**

Western Region CFA Society Conference

Las Vegas, Nevada

**December 15, 2016**

New Charter Ceremony & Holiday Party

Grand Hyatt Seattle 721 Pine Street Seattle, WA 98101

**Thursday, January 19, 2017 | 5:00 PM – 9:00 PM**

2017 Annual Economic Forecast Dinner featuring Amity Schlaes

Sheraton Seattle Hotel 1400 6th Avenue Seattle, WA 98101

**April 6 to 8, 2017**

2017 Americas Regional Research Challenge

Grand Hyatt Seattle 721 Pine Street Seattle, WA 98101

## PAST EVENTS

### AUGUST

**August 19, 2016** | 8<sup>th</sup> Annual Golf Tournament & Social | Interbay Golf Center

### SEPTEMBER

**September 21, 2016** | CFA Society Seattle Volunteer Recruiting Social | Brave Horse Tavern

**September 28, 2016** | "Investing in a Moody World" | The Rainier Club

**September 29, 2016** | CFA Women's Network Kickoff Event | The Rainier Club