

Dear Society Members and Candidates:

While the Coronavirus (COVID-19) pandemic is changing the way we all live and work, we at CFA Society South Florida are committed to serve you.

I am honored to fulfill my second and final year as your Society President for 2020-2021. I feel even more fortunate to have the pleasure of working alongside three South Florida Past Presidents in volunteer and executive roles. I'd like to take this opportunity to thank the Board and society volunteers for donating life's most valuable asset – their time – in support of our mission to lead the investment profession locally by promoting the highest standards of ethics, education, and professional excellence.

The Board would like to acknowledge the **contributions of Directors Wesley Burns, CFA, CFP and Philip J. Keating, CFA** who completed their term and stepped down from the board as of June 30, 2020.

Wesley served as Education Chair after several years of volunteering for the society. During his tenure he successfully spearheaded the February 2020 Florida Societies Research Challenge, coordinating the logistics for the competition held at the University of Miami among universities statewide.

Philip served as our longtime Programs Chair and his notable program additions include the Annual Forecast panel, the Charterholder Awards Ceremony, and the Alternative Investments panel. He tirelessly promotes the value of the CFA designation and is passionate about continued Professional Learning as evidenced by receiving his 25-year certificate for Continuing Education from the CFA Institute. He prioritizes mentoring younger CFA Charter holders and future CFA Society leaders. In recognition of his decades of service to the society, **the Board of the CFA Society South Florida hereby renames the Volunteer of the Year Award to the Philip J. Keating Award.**

Thank you to Wes and Phil for their service to CFA Society South Florida!

Here are some highlights from 2019-2020:

- Partnering with CFA New York to provide CFA South Florida society members access to insightful content – an invaluable resource during our temporary pivot to virtual events.
- After a hiatus, we have restarted educational events in downtown Fort Lauderdale, most recently with The Psychology of Investing with Morgan Housel that took place in February.
- Our society hosted a successful Florida Societies Research Challenge and students from Florida State University won the challenge and advanced to the Americas Regional.



When we begin to meet in person again, you will notice some new faces on the board. [Melissa Masterson-Kellenberger, CFA](#) is Co-Chair of the Programs Committee along with me. [Christopher Fetes, CFA](#) is Institutional Relations/Placements Committee Chair and [Erik Benson, CFA](#) is Education Committee Chair. We also welcomed a new Society Administrator, Judith Conmy, who will be greeting you at events and will be liaising with members and society volunteers.

While we are unable to connect in-person now, we have an exciting year planned of informative and exciting events that **you can access virtually at your convenience**. Be sure to join us for an exciting discussion on [Regulation Best Interest delivered by the Securities and Exchange Commission](#) on Wednesday, August 26th and a [Summer Social](#) scheduled for Thursday, September 3rd to kick off the new fiscal year and meet our new board members. Register early for our annual [Career Development Panel](#) featuring decision-makers from PNC Bank, FP&L/Next Era, Robert Half, Castle Wealth Management, and Sungarden Investment Management taking place on Wednesday, September 16th.

Although programming has switched to a virtual platform there are still several ways for you to remain active and engaged as a member. [Check out our listing of volunteer opportunities](#) and sign-up today.

If you haven't already, there's still time to [renew your membership](#). With your renewal, CFA Society South Florida will be there to help you meet your professional goals. I implore you to take advantage of all that your local CFA chapter has to offer by participating in another outstanding year of high-value programs and professional development.

Thank you for your Society membership and please stay safe.

Tisha Turner

Tisha Turner, CFA, CAIA, FRM
Board President and Programs Co-Chair
CFA Society South Florida