CFA Society of Washington, DC – Fact Sheet

The CFA Society of Washington, DC is the leading association of investment professionals in the Washington, DC metropolitan area. The Society links its members with each other, those interested in joining the profession, and the community through many activities including professional development and networking events. The Society also sponsors local classes to prepare candidates for the Chartered Financial Analyst (CFA) exam, a prerequisite to earning the CFA designation, which is awarded by the CFA Institute and has been attained by most Society members.

Founded in 1953, the Society consists of nearly 2,000 financial professionals , including student, candidate and guest members, in a variety of positions including portfolio managers, analysts, trust officers, and consultants, as well as pension, endowment and foundation fund executives. Reflecting the diverse nature of the investment professions in the Washington, DC area, members are employed by major corporations, associations, unions, national, state and local government agencies, financial regulators, academic institutions, investment managers, insurance companies, broker/dealers and consultants, among others.

Charterholder		
Type	**Active Members**	**% Subtotal**
Charterholder	1,668	92.3%
Non-Charterholder	139	7.7%
Subtotal	1,807	90.0%
Student/Guest	200	
Total	**2,007**	

Age Range		
Age Range	**Active Members**	**% Subtotal**
21-25	3	0.2%
26-30	164	9.5%
31-35	297	17.2%
36-40	344	19.9%
41-45	341	19.7%
45-50	219	12.7%
51-55	164	9.5%
56-60	101	5.8%
61-65	54	3.1%
>65	43	2.5%
Subtotal	**1,730**	**95.7%**
No data	77	4.3%
Total	**1,807**	

Educational Degrees Held		
Degree	**Active Members**	**% Subtotal**
In progress	1	0.1%
Bachelors/equivalent	942	61.2%
Masters/equivalent	701	45.5%
MBA	198	12.9%
Doctorate	74	4.8%
JD	28	1.8%
MD	1	0.1%
Subtotal / % of Total	**1,540**	**85.2%**
Total	**1,807**	

Years in Industry		
Years in Industry	**Active Members**	**% Subtotal**
Not Applicable	61	3.4%
5 years or less	94	5.3%
6-10 years	412	23.3%
11-15 years	465	26.3%
16-20 years	272	15.4%
Over 20 years	467	26.4%
Subtotal / % of Total	**1,771**	**98.0%**
No data	36	2.0%
Total	**1,807**	

CFAW members' employers, clients, AUMs and investment practices are likewise diverse.
Please see flip side for additional professional demographics.

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CFA Society Washington, DC

Primary Asset Base		
Type	**Active Members**	**% Subtotal**
Institutional	548	32.8%
Private	248	14.8%
Both	90	5.4%
N/A	786	47.0%
Subtotal / % Total	**1,672**	**92.5%**
No data	135	7.5%
Total	**1,807**	

Assets Under Management		
AUM in USD	**Active Members**	**% Subtotal**
<250 million	155	9.3%
250 million < 1 billion	97	5.8%
1 < 5 billion	144	8.6%
5 < 20 billion	138	8.2%
20 < 50 billion	132	7.9%
50 < 250 billion	123	7.3%
> 250 billion	213	12.7%
N/A	602	36.0%
Prefer not to answer	70	4.2%
Subtotal / % Total	**1,674**	**92.6%**
No data	133	7.4%
Total	**1,807**	

Investment Practices (All)		
Investment Practice	**Active Members**	**% Subtotal**
Commodities	332	20.1%
Derivatives	599	36.2%
Equities	762	46.0%
Fixed Income	993	60.0%
Foreign Currency	340	20.5%
Hedge Funds	337	20.4%
Indexed	330	19.9%
Private Equity	408	24.7%
Real Estate	509	30.8%
Structured Products	484	29.2%
Venture Capital	201	12.1%
Other	220	13.3%
N/A	389	23.5%
Subtotal	**1,655**	**91.6%**
Total	**1,807**	

Buy Side - Sell Side		
Type	**Active Members**	**% Subtotal**
Buy Side	775	46.4%
Sell Side	124	7.4%
Both	112	6.7%
Neither	660	39.5%

Occupation					
Occupation	**Active Members**	**% Subtotal**	**Occupation**	**Active Members**	**% Subtotal**
Accountant/Auditor	51	3.2%	Portfolio Manager	267	16.8%
Chief Executive	113	7.1%	Relationship Manager	22	1.4%
Consultant	182	11.5%	Research Analyst	202	12.7%
Corporate Finance	141	8.9%	Risk Manager	140	8.8%
Financial Advisor	91	5.7%	Strategist	44	2.8%
Investment Banking	53	3.3%	Trader	23	1.5%
Manager of Managers	78	4.9%	Other	178	11.2%

Topics of Interest					
Topic	**Active Members**	**% Subtotal**	**Topic**	**Active Members**	**% Subtotal**
Alternative Investments	816	48.3%	Leadership/Communications	462	27.4%
Behavioral Finance	787	46.6%	Other	71	4.2%
Corporate Finance	687	40.7%	Performance Measurement	485	28.7%
Derivatives	738	43.7%	Portfolio Management	1058	62.7%
Economics	971	57.5%	Private Wealth Management	545	32.3%
Equity Investments	1014	60.1%	Quantitative Methods	663	39.3%
Financial State't Analysis	752	44.5%	Risk Management	849	50.3%

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