ABOUT CFA SOCIETY MADISON

The Mission of CFA Society Madison is to lead the investment profession locally by promoting the highest standards of ethics, education, and the professional excellence for the ultimate benefit of members and the community.

Our society is an association of local investment professionals. Consisting of portfolio managers, investment advisors, educators and other financial professionals. We envision a CFA Society Madison that:

- is well-known in the Madison business community and is regularly looked to as an objective resource because of its expertise on investment-related issues;
- has an actively engaged membership that receives maximum value from their dues investment because of society-sponsored networking events and the consistent delivery of high-quality educational programs; and
- serves as a hub for CFA-related initiatives in the Midwest through collaborative endeavors with other societies in the region and partnerships with various third parties.

As one of CFA Institute member societies, our society connects members to a global network of investment professionals.

Our membership consists of individuals that are employed with area insurance companies, banks, money managers, wealth management firms, public agencies, universities and corporations. The job functions represented by membership are diverse ranging from equity, fixed income and alternative investment analysts to portfolio managers, wealth managers, sales and marketing professionals and partners, principals and CEOs of their firms.

FACTS & FIGURES

- Number of CFA members globally – 200k+
- CFA Local Societies – 160+
- CFA Madison Members - 241
- Number of local CFA candidates – 70
- Top occupations of members – Portfolio Manager, Investment Analyst

AT A GLANCE

97% Charterholder Member

87 % Male Members

13% Female Members

50 Average Member Age

Education | Career Center | Networking | Professional Development | Member Directory

CFA Society Madison

CFA SOCIETY MADISON

BENEFITS OF SOCIETY MEMBERSHIP

As a member of a truly global organization, with a local focus you can:

- Networking with peers worldwide and socialize with industry insiders
- Be part of a collective global voice for protecting the interests of the profession
- Stay abreast of relevant topic and trends that affect the industry in your market
- Take advantage of continuing education opportunities
- Explore CFA Program scholarship opportunities

MEMBERSHIP REQUIREMENTS

Charterholder Member

- Member of CFA Institute and CFA Society Madison
- 4000 hours of relevant work experience over 36 months
- Passed all three levels of the CFA Program
- Professional references

Professional Member

- Member of CFA Institute and CFA Society Madison
- 4000 hours of work experience
- Pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct
- Hold a bachelor's degree or equivalent
- Pass Level 1 of the CFA exam, Level II CIPM or pass the self-administered Standards of Practice Exam

REFERENCES

Three professional references are required with your application. If one of your references is from a regular member of CFA Society Madison, then only two professional references are required. References from your supervisor(s) are preferred.

VOLUNTEER OPPORTUNITIES

CFA Society Madison has a vibrant team of volunteers seeking to bring valuable information and experiences to our membership. We are continually looking to expand our network of volunteers who bring creative ideas and energy to our group. If you are a Professional or Affiliate Member of CFA Society Madison and would be interested in becoming a society volunteer to assist in helping the Society achieve its goals, please send an email to cfa@cfamadison.org and we will be in contact with you to discuss the opportunities.

JOIN CFA SOCIETY MADISON

Charterholder, Professional & Affiliate Society Membership Dues: $150

Charterholder, Professional & Affiliate Professional Leave Dues: $75

CFA Institute Membership: $299

For full information visit our membership page, or to apply for membership, visit CFA Institute's website.

EVENTS & PROGRAMMING

- Annual Outlook Dinner
- New Charterholder Event
- CFA Institute Research Challenge
- Continuing Education Programs
- Madison Investment Conference

INITIATIVES

Education
Programming
Financial Literacy Initiative
Women in Investment Management

Education | Career Center | Networking | Professional Development | Member Directory

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