

Annual Meeting

Society Year 2022 - 2023



**CFA Society
Nashville**

AGENDA

Welcome – Ann Taylor Knotts, CFP, CFA

Programming – Johnny Garrison, CFA

Membership & Candidate Services – Russ Barnard, CFA

Advocacy & Community Outreach – Michell Bosch, CFA, CTP

Greater Tennessee Research Challenge – Sam Carden, CFA

Treasurer – Austin Branstetter, CFA

New Business – Ann Taylor Knotts, CFP, CFA

WELCOME

ANN TAYLOR KNOTTS, CFA, CFP - PRESIDENT

Our mission is to equip members to be leaders in our community by promoting the value of the CFA designation and facilitating the exchange of ideas and resources for the ultimate benefit of Middle Tennessee.



**CFA Society
Nashville**



Current Strategy – Our 4 Objectives



MEMBERSHIP & CANDIDATE ENGAGEMENT

Develop initiatives to facilitate re-enrollment of current and lapsed members in both CFA Institute and CFA Society Nashville and to support candidates through their journey to build a pipeline for future members



MEMBER VALUE

Provide a high level of Member Value by facilitating professional learning events, member networking opportunities and positioning the society as a comprehensive educational resource



BRAND AWARENESS

Increase awareness among local institutions and the general public (considering both brands of the Institute and Society itself)



INFRASTRUCTURE

Continue professionalization of CFA Society Nashville with a volunteer management program, outlining effective committees of the board supported by professional staff and an effective, strategic board

Staff

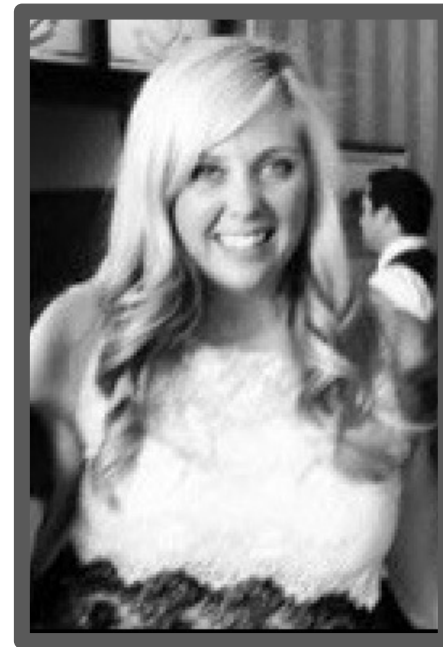
Angie Brown

Executive Director



Claire Hudson

Technology & Events
Marketing Coordinator



PROGRAMMING

JOHNNY GARRISON, CFA - CHAIR

2022 - 2023 Programming Year In Review

September 2022

Behavioral Investing In A Bear Market - Michael Bailey, CFA

Director of Research and Chair of Investment Committee

FBB Capital Partners

October 2022

Hospitality Real Estate Investing Panel Discussion

Jeremy Gorsky (AJ Capital), Matt Bodnar (Bodnar Investment Group) and Matt Wiltshire (former Director of Mayor's Office of Economic and Community Development)

November 2022

ESG Investing and Analysis

Nick Ashburn of PNC Bank

December 2022

Holiday Wine Tasting!



January 2023



January 18
City Winery

Gargi Pal Chaudhuri

Head of iShares Investment Strategy
BlackRock

William H. Eigen III

Managing Director, head of Absolute
Return and Opportunistic Fixed Income
Team at J.P. Morgan Assets

February 2023

Cryptocurrency & Blockchain Technology

Ronit Walny, Tyler Evans (BTC Inc & UTXO Management)

Rod Roudi (Galactic Freedom Company, Builders In Bitcoin and POD256 podcasts)

Wade Peery (FirstBank)

March 2023

DR

Opportunity Zones - Legislation & Investing

Jeff Feinstein of Pinnacle Partners

April 2023

2023 State of the Banks

Asset-Liability Management Insights & Financial Outlook from Local Bank Industry Experts

Hope Willard Lundt CFA

Managing Partner, Spence Limited, LP

Jeff Davis, CFA

Managing Director, Financial Institutions Group, Mercer Capital

Michael Mettee

Chief Financial Officer, FirstBank

Brett Rabatin, CFA

Managing Director, Head of Equity Research, Hovde Group

CFA Society North Carolina Partnership

A Fireside Chat with

Nuveen's CIO, Saira Malik

May 2023

Member Event at the Nashville Zoo



MEMBER & CANDIDATE SERVICES

RUSS BARNARD, CFA , CFP - CHAIR

2023FY M&CS Services Review

DATA

- 379 active Society Members, 324 (97%) renewed, 9 lapsed/cancelled, 55 net transfers
 - Only 31 cancelled/lapsed in FY22
- 98 unaffiliated CFAI Members in the Nashville Area
 - 20 sitting for LV 3 exam in August
- 158 candidates registered for May, August, & November exams in our market

SERVICES

- Member Survey
- (2) New Member Breakfasts
- Wine Tasting/Holiday Event
- Zoo Outing

2024FY Plan

Analyze the
survey
results

Sort out test
partnership

Continue
the new-
member
breakfast

Be
responsible
to M&Cs

Translate the
survey results
into
committee
objectives

Iron out
mock-exam
(Belmont)

Continue
Meet the
Professionals

ADVOCACY & COMMUNITY OUTREACH

MICHELL BOSCH, CFA, CTP - CHAIR

University outreach and young employee education

Policymaker outreach

Employer outreach

RESEARCH CHALLENGE

SAM CARDEN, CFA - CHAIR

RESEARCH CHALLENGE

Greater Tennessee
Local Competition Winner:
University of Tennessee
at Chattanooga

Hunter M. Holzhauser, Ph.D., *Faculty Advisor*

PARTICIPATING UNIVERSITIES	FACULTY ADVISOR
Belmont University	Dr. Joe Smolira, CFA
Chattanooga – University of Tennessee	Dr. Hunter M. Holzhauser
Knoxville – University of Tennessee	Dr. Craig Ruff
Fisk University*	Dr. Oghenovo Obrimah
Lipscomb University	Dr. Han-Sheng Chen
Middle Tennessee State University	Dr. Kevin Zhao, CFA
Sewanee*	Dr. Huarui Jing
Southern Adventist*	Dr. Doug Frood

AUSTIN BRANSTETTER, CFA

TREASURER

FY2023 Financial Review

- Current Cash Balance: \$184,865, down \$20,900 from \$207,765 at FYE2022
- Cash Inflows YTD*: \$100,669
 - CFAI Operational Funding: \$34,794 – down 10% from FY22
 - Event Sponsorship & Tickets: \$33,875 – down 44% from FY22
 - CFASN Membership Fees: \$27,913 – up 7% from FY22
- Cash Outflows YTD*: \$121,569
 - Programming & Events: \$93,896 – up 39%, but expense from 2022's Music Royalty event carried over into this fiscal year, up 6% adjusting for that
 - Staffing Costs: \$21,735 – down 30%
 - Administrative Expenses: \$5,937 – down 29%
- Expected net cash inflow for remainder of fiscal year: ~\$3,000
- All legal, regulatory, and tax filings current and up-to-date

*YTD Financials as of June 19, 2023

Annual Meeting – New Business

Survey Results

Election of Returning Director and New Directors

Contact Us

Survey Results: Most Valued Member Benefit

1. Networking & Social Events
2. Annual Forecast Dinner
3. Professional Learning
4. Communication with Members
5. Multi-Society Regional Events

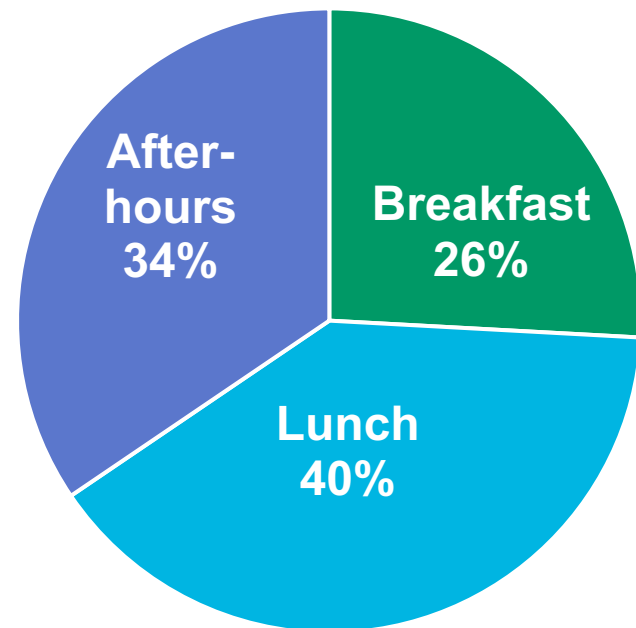
Survey Results: Programming

Topics:

1. Market Outlook
2. Behavioral Finance
3. Annual Forecast Dinner
4. Alternative Investments
5. Portfolio Management

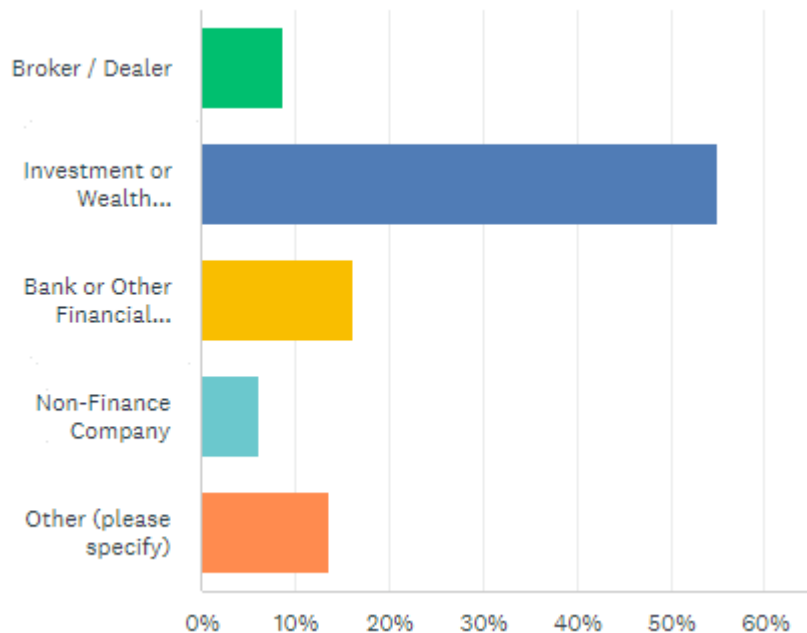
Logistics:

In-person!

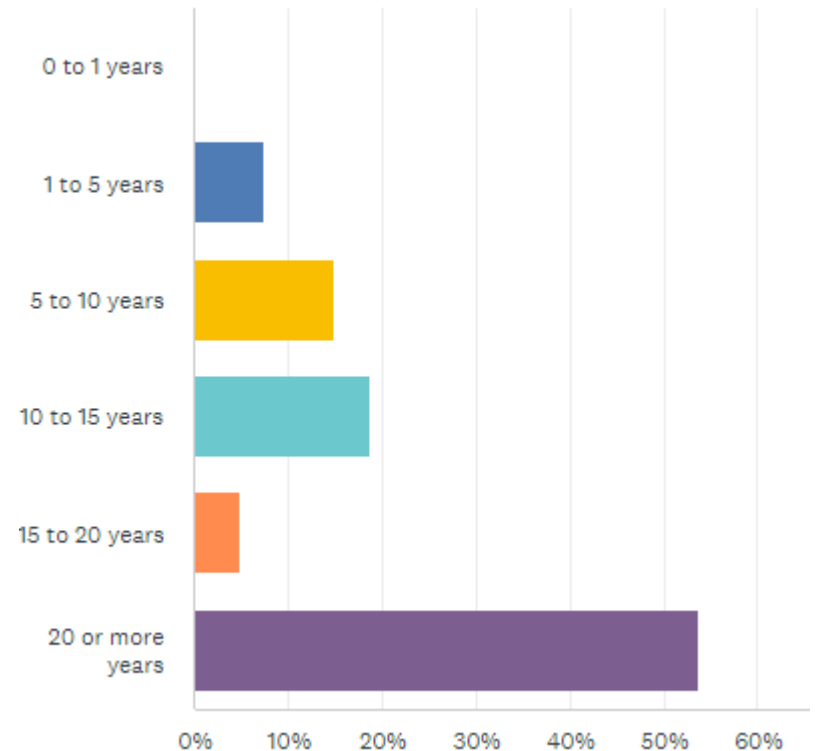


Survey Results: Member Demographics

Industry Segment



Years of Experience



Election of New Directors

Michell Bosch, CTP, CFA

Renewing Director



Elliott Brewer, CFA

New Director



Alice Campbell, CFA

New Director



THANK YOU!

Questions or Feedback?
info@cfanashville.org



**CFA Society
Nashville**