

ABOUT US



**CFA Society
Orlando**

MISSION

The CFA Society Orlando is a member of the CFA Institute Global Network of Societies who's mission is to lead the finance profession in Central Florida by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

LEADERSHIP

OFFICERS

Thomas Harrington, CFA
President

Steve Curley, CFA
Vice President

Kevin Reher, CFA
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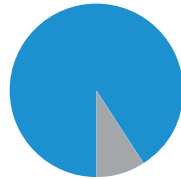
John Wilenski CFA

STATISTICS

(as of 12/19/23)

286

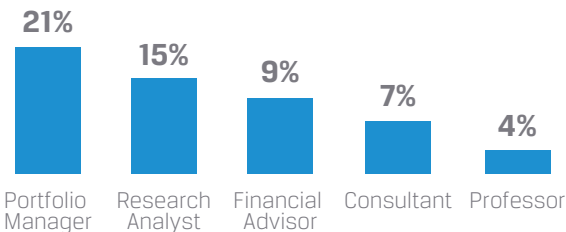
Active
members



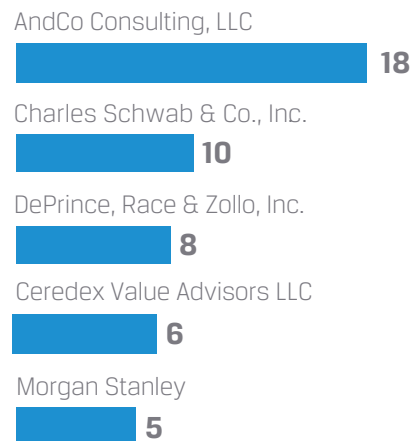
95%

Charterholders

Top 5 job functions

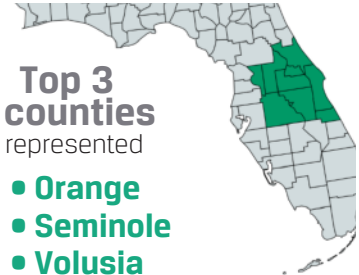


Top 5 employers represented



Top 3 counties represented

- Orange
- Seminole
- Volusia



EVENTS

In FY23, CFA Society Orlando focused on offering a diverse array of top-notch speakers and local networking opportunities. Over the course of the year, we hosted 13 events—both in-person and virtual. This included seven informative programs and panels, as well as Five social gatherings such as our 2nd Annual Glow Ball Golf Tournament and our 30th Anniversary Celebration.

INVESTORS FIRST PODCAST

In 2020, the Society introduced the Investors First Podcast with the aim of educating both investors and investment professionals in Florida, across the Americas, and beyond. The podcast focuses on enhancing your understanding as an investor or advisor. Featuring subject matter experts from our Society, the show includes interviews with Founders, CEOs, Chief Investment Strategists, Federal Reserve Presidents and more to

discuss timely and relevant topics in finance. The CFA Institute awarded our Society the 2020 Impact and Innovation Award for the Investor's First Podcast.



MEMBERSHIP

Membership is open to CFA charterholders, candidates actively enrolled in the CFA Program, and individuals who have previously passed the CFA Level I exam. The annual dues for regular and affiliate members are \$100. Membership comes with a variety of benefits, including professional development, advocacy initiatives, networking opportunities, and educational resources.

GET INVOLVED

Volunteering helps you contributing to the local investment community as well as influence the direction of CFA Society Orlando and its programs.

Here are a few ways to get involved today:

- Attend an event
- Become a Board Committee Member
- Post a job (free job board for employers)
- Become a Sponsor (Annual or event)
- Speaking opportunities
- University volunteer opportunities

ANNUAL SOCIETY SPONSORS

PLATINUM



SILVER



J.P.Morgan



PARAMETRIC

T.RowePrice 

CONTACT US

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407-221-3443

FIND US

Website: cfasociety.org/orlando



@CFAOrlandoFL



CFA Society Orlando

We are proud to announce that
CFA Society Orlando is the most
followed CFA Society in the
Southeast on social media.

ABOUT CFA INSTITUTE

MISSION

CFA Institute is a global community of investment professionals working to build an investment management industry where investors' interests come first, financial markets function at their best, and economies grow.

We advocate for financial market integrity and develop and promote ethical and professional standards, such as the Global Investment Performance Standards (GIPS®) and the Asset Manager Code of Professional Conduct™, and our members uphold our industry-leading Code of Ethics and Standards of Professional Conduct.

CFA INSTITUTE STATISTICS

- Fewer than **1 in 5** candidates who begin program successfully earn the **CFA Charter**
- More than **180,000 CFA Charterholders** globally
- More than **190,000 members** in **160 countries**
- **160+ local societies worldwide**
- Global Investment Performance Standard (GIPS®) championed locally in more than **40 countries**

BECOMING A CHARTERHOLDER

The Chartered Financial Analyst (CFA) credential is the most respected and recognized investment management designation in the world. The curriculum covers academic theory, current industry practice, and ethical and professional standards to provide a strong foundation of advanced investment analysis and real-world portfolio management skills. A work experience requirement and an annual ethics statement ensure career-long professional excellence by those who have earned the CFA Charter. To find out more about the CFA Charter, please visit www.cfainstitute.org/cfaprogram.