

# ABOUT US



## 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**
- Andrew Papke, CFA**  
President
- Christina Shaffer, CFA**  
Vice President
- Kevin Reher, CFA**  
Treasurer
- Kyron Harold, CFA**  
Secretary

- BOARD OF DIRECTORS**
- Thomas Harrington, CFA**
- Yinyan Ibanez, CFA**
- Mitchell Lamoriello, CFA**
- Xinxin Liu, CFA**
- Steven Rogers, CFA**
- Stuart Smith, CFA**

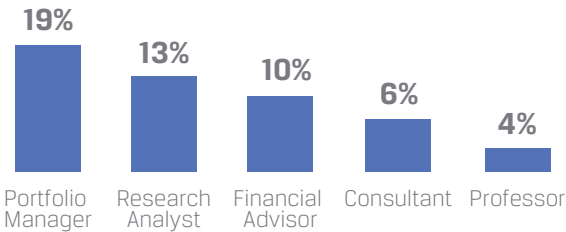
- ADVISORY COUNCIL**
- Marisa Bradbury, CFA**
- Martin Bel, CFA**
- Steve Curley, CFA**
- Dan Fasciano, CFA**
- Kevin Laake, CFA**
- Gerry Lachnicht, CFA**
- F. Javier Perez, CFA**
- John Wilenski CFA**

## STATISTICS

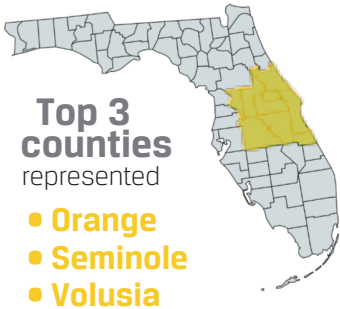
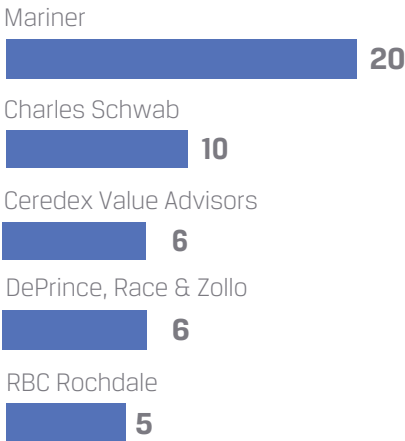
(as of 06/30/24)



## Top 5 job functions



## Top 5 employers represented



## EVENTS

In FY24, CFA Society Orlando dedicated itself to providing a variety of high-quality speakers and local networking opportunities. Throughout the year, we organized nine events, which featured five informative programs and panels, our Annual Dinner, and three social gatherings, including our first-ever pickleball tournament.

## 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.



## 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

## MEMBERSHIP

Regular membership is open to CFA charter-holders and candidates actively enrolled in the CFA Program who have passed the CFA Level I exam. Affiliate membership is available to industry professionals not pursuing the CFA charter. Local annual dues are \$100 for regular members and \$50 for affiliate members. Membership includes access to professional development, advocacy initiatives, networking events, and educational resources.

## ANNUAL SOCIETY SPONSORS

**GOLD**



**SILVER**

 **First Trust**      **J.P.Morgan**

**T.RowePrice** 



### CONTACT US

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**aroberts@cfaorlando.org**

**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 **190,000 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](http://www.cfainstitute.org/cfaprogram)**.