

Eastern US

Candidate: Chris Cutler, CFA



Nomination Packet, PCR, Eastern US

Statement of Qualifications and Intention

Dear CFA Institute,

I intend to run for PCR this year. I served in many capacities at the CFA Society New York. For example, I served as Vice Chair from 2016 to 2018, and I also served as this Society's representative to several CFA Institute society leadership events. I also manage an investment consulting firm that evaluates alternative investments and OCIOs for institutional investors. My firm has evaluated over 2,000 managers and 50 OCIOs since its founding in 2003. From this perspective, I see the evolution of thinking among key asset allocators as well as trends in employment practices that affect the value of the CFA designation.

Vision for PCR Term

We have work to do, and here is what I would advocate for. I would like to help CFAI better realize the benefits of supporting local societies. CFAI already helps us with website, email, member database support, dues collection, and other matters. They can help us better promote the brand to our communities. For example, local societies provide a "safe place" where industry experts can discuss the most pertinent issues they face, and by helping us pull key decisionmakers to us through our community and our events, we are more closely connected with the future of finance. I would also like to see better use of the CFA Charter among asset owners, the burgeoning single family office marketplace, and in alternative investment markets because they are key growth areas for both employment and asset allocation. We can help CFAI reach those organizations through our local networks.



I look forward to reconnecting with Society leadership in our district and representing them at the CFA Institute.

Letter of Reference

Chris was a key architect of the revitalization of CFA Society New York in the mid-2010s. Chris played a key role in transforming our Society from an organization with very little member engagement and unrestricted reserves trending towards zero (2009–2014) into an organization with remarkable achievements during what I consider our Society's Golden Age from 2016 to 2019, including:

1. **Winning CFA Institute's 2017 Delivering Member Value Award**
[<https://cfany.org/cfa-institute-honors-nyssa-at-2017-leadership-conference/>]
and
2018 Most Outstanding Society Award
[<https://cfany.org/cfany-wins-two-2018-society-excellence-awards-from-cfa-institute/>]
2. **Growing unrestricted reserves** from a deficit of \$149K in FY2015 to a surplus of \$2.8M in FY2019.
3. **Hosting exceptional events** featuring CIOs and other industry leaders — such as our 2019 ESG Summit, which attracted over 130 speakers representing \$10 trillion in fiduciary assets
[<https://cfany.org/event/2nd-annual-climate-and-esg-asset-owner-summit/>]
and hosted in partnership with 11 fellow CFA Institute Member Societies across EMEA, APAC and the Americas.
4. **Co-hosted in-person events** in partnership with the following CFA Institute Member Societies in their local markets:
CFA Society Japan, CFA Society Hong Kong, CFA Society France, CFA Society Philadelphia, CFA Society Washington DC, CFA Society North Carolina, CFA Society Emirates, CFA Society Atlanta and many other fellow societies.
5. **Empowering and supporting volunteer-driven content** to power our events, ensuring member engagement and community building in a way that was not onerous and made volunteering fun.

Chris played a vital role as both a volunteer leader and CFA Society New York Board Director in the above accomplishments, and I highly recommend him.

Best,
Thomas Brigandi, CFA
Current Board Director and Former Chair of the Board of Directors
CFA Society New York



[Nominator](#)

Nomination submitted by David Allen, CFA