

Eastern US

Candidate: Robert Norton, CFA



Nomination Packet, PCR, Eastern US

Statement of Qualifications and Intention

Qualifications:

- CFA Institute Regular Member in good standing
- CFA Charterholder
- Over three years of experience as a CFA Society Board Member in an established society

Statement: I earned my CFA charter in 1994 and am a member in good standing (see attached Membership Verification Letter). I have served on the CFA Society Philadelphia (CFAP) Board from 2014 to present, including roles as President (2018-2019). It is my intention to run for PCR.

Vision for PCR Term

My interest in the Presidents Council Representatives (PCR) stems from my desire to build on my experience with the CFA Society Philadelphia (CFAP) Board, experiences working with the CFA Institute as President of the CFAP and interactions with fellow Society Leaders at CFA Institute events (SLC Hong Kong 2018, London 2019, Americas SLC Vancouver 2018 and 70th CFA Institute Annual Conference Philadelphia 2017). Three areas I will focus on during a term as PCR would be:

1. **Grow the CFA charter and membership** by encouraging young finance professionals to seek the CFA Charter. It is critically important to broaden the candidate pool by encouraging prospective charter holders from a wide range of demographics. I strongly believe financial literacy efforts can lead a broader group of individuals to considering finance as a career.



CFA Institute

2. **Foster the critical relationship between the CFA Institute and the CFA Societies of the Eastern US Region.** The unique dynamic between the Institute and Societies can be facilitated by effective communication.
3. **The Eastern US Region is a critical component of the CFA** with over 25,000 members represented. I look forward to building on the excellent work of the current Eastern Region PCR, Greg Filbeck. He has established a Society Leaders Conference for the Eastern Region, and I fully intend to continue that event. Focusing on regular communication and sharing best practices among the wide variety of Societies in the Eastern Region are important goals.

Letter of Reference

To the President's Council,

I would like to nominate Robert (Rob) Norton as our Eastern Region PCR.

I am the current President of the CFA Society Philadelphia (CFAP). I joined the board in 2018, met Rob at that time, and have served beside him since then. Rob has been active in CFAP leadership roles for a decade, has served as CFAP President, and continues actively participating on our board. He's volunteered on the CFAP Board in almost every role. Given how closely we've worked together, my comments are 100% accurate and are more substantiated than most letters of recommendation.

I've seen Rob produce results through a consistent and contentious approach in which he asks tough questions and shares his logic and thoughts with his fellow board members. More importantly, I've observed Rob raise the engagement level of our board, lifting the group and our meeting dialogs to more thoughtful levels. Having worked in finance for 30 years, I can say that people with Rob's level of engagement are few and far between. I welcome anyone with Rob's work ethic and motivation into any program I am involved in.

Rob is a natural leader. He invests himself fully and makes productive connections with his peers. He shares, rather than takes, credit for success and has the skills to continue achieving impressive results. His peers and others who are in authoritative positions trust his judgment. Rob's character has led him through a very successful career.

Rob will bring energy and insight to the PCR role. He is more than capable of contributing to a global organization that will likely face a varied and growing set of challenges. I am honored to nominate Rob to serve as our Eastern Region PCR. Please accept this letter as the strongest possible recommendation in support of Rob.

Sincerely,

Richard Jakotowicz, CFA
President, CFA Society Philadelphia



Nominator

Nomination submitted by Peter Conners, CFA, Executive Director, CFA Society Philadelphia