

Central US

Candidate: David Lewis



Nomination Packet, PCR, Central US

Statement of Qualifications and Intention

Dear members of the Presidents Council for the CFA Institute,

I am happy to announce my intention to run for second term as PCR of the newly enlarged Central U.S. Region. Serving as PCR over the last two years has been the highlight of my volunteer experience working with the membership and leadership of our organization. To summarize my service with the CFA Institute and its societies:

- CFA Institute, Presidents Council Representative, Central & Southwest Region (member since 1999) | 2024 - Present
- CFA Societies of Texas, Advocacy Council Chair, past Board Member | 2012 - Present
- CFA Society of Seattle, Vice President, Board Member | 2020 - 2024
- CFA Society of Dallas/Ft. Worth, Past President, Board Member, Advocacy Chair | 2003 - 2024
- CFA Institute, Global Capital Markets Policy Council, Past Chair | 2016 - 2023
- U.S. Standards & Advocacy Advisory Committee to CFA Institute Board of Governors | 2016 - 2018
- CFA Institute, Capital Markets Policy sub-Committee - Americas | 2013 - 2016

Non-CFA industry activity

- UNT Ryan College of Business, Finance Advisory Board, Founding Member | 2020 - Present
- CFP Board, Member | 2020 - Present



- Texas State Affordable Housing Corporation | 2026 - Present

In addition, I am and have been a member in good standing since earning my charter in 1999.

This letter is to serve as my formal notice to run for the position as PCR. I will follow this email within the week with my personal statement for my vision in my next term as PCR.

Thank you for your consideration. Please let me know if you have any questions.

David V. Lewis, CFA, CFP

[Vision for PCR Term](#)

Dear Fellow PCRs for the CFA Institute and Society Leaders of the Central U.S.,

As I seek a second term as Presidents Council Representative for the expanded Central U.S. Region, my vision is to transform our increased scale into a unified force for professional excellence. We are no longer a collection of disparate chapters; we are a powerhouse region home to many of the world's greatest investors and two of the globe's premier financial centers.

My priorities for this term focus on three strategic areas:

- **Cohesive Regional Participation:** Size is only an advantage if it is met with coordination. I will continue to work directly with our local society boards to ensure that the "best-of-breed" programming developed in our major hubs is accessible across the entire region. By fostering a culture of shared resources and joint initiatives, we will ensure every member, regardless of their local chapter's size, feels the full weight and value of the CFA Institute.
- **Navigating Leadership Transition:** With the CFA Institute currently navigating a CEO transition, the role of the PCR as a bridge has never been more vital. I will serve as a disciplined, consistent voice for our region, ensuring that the needs of our local societies and the insights of our professional investment managers are clearly communicated to the Institute's executive leadership during this pivotal period of change.
- **Organic Growth Beyond the Traditional Pool:** To ensure the long-term vitality of the designation, we must look beyond our usual circles. I will continue to push for engagement with large local businesses and corporate entities that have not traditionally been part of our candidate pipeline. By demonstrating the value of the CFA Charter to these broader industry sectors, we will drive organic growth and expand the influence of our profession.

Together, we will leverage the immense talent within our borders to build a region that is as influential as the markets we serve.

Sincerely,



David V. Lewis, CFA, CFP

[Letter of Reference](#)

Good Evening CFA Institute Presidents Council,

I highly recommend David Lewis, CFA for the PCR position.

David and I worked together over ten years ago to create the CFA Texas Advocacy Committee. The two of us still co-chair this committee today.

Over the years I've worked with him, David has been an invaluable resource to our local societies, consistently providing clear communication and advocating for our needs at the Council level. He is highly collaborative, responsive, and deeply invested in the success of our network. I fully support his candidacy for a second term."

Please feel free to contact me with any questions.

Best regards,

Pat H Swanson, CFA

Past President, CFA Society Houston

Past President, CFA Societies Texas

[Nominator](#)

Nominations submitted by Pat H Swanson, CFA & Lela Dunlap, CFA