

SOCIETY NEWSLETTER



CFA Society Columbus

In this edition of the CFA Society Columbus newsletter:

**Sponsor Thought Leadership
Upcoming Society Events
Upcoming Volunteer Opportunity
Meet our New Columbus Society Board Members
Mentorship Program Update
Annual Sponsorship Opportunities 2026
Thank you, society sponsors!**

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If you would like to submit content for future newsletters, please contact **Jack Miklos, CFA** - miklos.jack@gmail.com

2025-2026 Columbus Board Members

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Jeff Liu, CFA - Mentorship
Jia Ying Guo, CFA - Research Challenge
Jayant Jangra, CFA - Assistant Research Challenge
Kelly Noll, CFA - University Relations
Jack Miklos, CFA - Communication & Community Involvement
Colin White, CFA - Sponsorship & Employer Relations

Sponsor Thought Leadership

Diamond Hill

Featured Research from Diamond Hill, **Gold Level Sponsor**, a valuation-disciplined boutique asset manager focused on institutional-oriented investors.

[Searching for "Enough": The Price of Risk in an Uncertain World](#)

Are you chasing more when you already have enough? In a market driven by FOMO and fragile fundamentals, portfolio manager Austin Hawley, CFA, explores how to find balance between risk and reward — and where value truly lies.

Dimensional Fund Advisors

Featured Research from Dimensional Fund Advisors (DFA), **Silver Level Sponsor**, applying academic research to practical investing across a full range of equity and fixed income strategies.

[Stocks Can Still Go Up When the Government Shuts Down](#)

The US government shut down after Congress was unable to reach a funding agreement. This is the 11th shutdown since 1981.¹ During these shutdowns, many nonessential functions of the government cease. In most cases, the fiscal shortfall was resolved within a few days. However, four shutdowns lasted at least five days.

How did stocks fare during these prolonged episodes? The US market ended higher at the conclusion of three and was flat in the other.

So, while a shutdown may be a nuisance, history suggests it's probably not cause for concern in your portfolio.

Upcoming Society Events

Don't forget our happy hours! Held at rotating locations around the Columbus area.

Speaker	Title	Date
Marc Chandler - Bannockburn Capital Markets	Fireside Chat: The Dollar, Interest Rates, and the Changing Global Order	11/6/2025 - Lunch
CIO/Local Leader Roundtable	CIO Perspectives 2025: Strategies, Shifts and Surprises Ahead	11/18/2025 - Dinner
Tyler Rosenlicht of Cohen & Steers	TBD	12/3/2025 - Lunch

If you have any ideas for future speakers, please email Jerry Brown brownjgb@hotmail.com or Peter Klingelhofer petekling@icloud.com.

Upcoming Volunteer Opportunity

CFA Society Columbus is partnering with Junior Achievement to make a difference in the lives of kids in our community. Can you help?

What: Volunteering at JA Finance Park

When: 12/04/2025 (Thu.) 8:00am-3:00pm EDT

Where: Columbus Learning Center 68 E. 2nd Ave, Columbus, OH (in the Short North area - free, on-site parking)

RSVP [Here](#)

No special expertise or training is needed. Just show up ready to go, and JA will get you started.

About JA Finance Park: Educators first teach personal finance lessons to their middle school classes. Then students are immersed in a simulation at the JA facility, where they experience making grown-up decisions while attempting to stick to a budget. Students are assigned a persona that includes educational background, career choice, income, debt, and family makeup, and move through the simulation by making purchasing decisions along the way.

Click on this [JA Finance Park Info Sheet](#) that explains a little more about the JA Finance Park volunteer experience. Be sure to click on the (short!) video to see JA Finance Park in action.

Meet our New Columbus Society Board Members

Colin White, CFA
Sponsorship & Employer Relations



Colin has been passionate about financial markets and investments since a young age. He studied Economics and Finance at Miami University and Otterbein University, where he also competed in track and field. As Portfolio Manager on the Investment Team, Colin leverages his expertise to deliver meaningful results for clients. Colin has earned the prestigious Chartered Financial Analyst (CFA™) designation, which represents a globally recognized standard in investment management. The CFA Program encompasses a rigorous graduate-level curriculum covering topics such as equities, fixed income, economics, financial reporting, derivatives, and ethics. Dedicated to making a positive impact on our clients, Colin actively contributes to the team's success and is a member of the CFA Society of Columbus. Born and raised in Westerville, he values quality time with family and friends. In his free time, Colin enjoys traveling, reading, and golfing.

What got you into your investment/financial services career?

My interest in finance was sparked by a combination of curiosity and the mentorship of great undergraduate professors. Although I initially entered university intending to study law, I soon discovered a deeper passion for understanding how financial markets function and what drives their movements. Today, at Frazier Financial, I'm fortunate to channel that curiosity into meaningful work: helping clients achieve financial confidence and peace of mind.

Why do you think a CFA charter is important?

The CFA charter has been pivotal in shaping my professional development, offering a breadth and depth of financial knowledge that enhances my decision-making and analytical capabilities. It serves as a strong foundation to excel in my career.

What do you do in your spare time?

I jump at any opportunity I can to travel, with the goal of visiting every country in Europe.

What is a fun fact many don't know about you?

I am ambidextrous and used to switch off which hand I would write with until I was in 3rd grade.

Kelly Noll, CFA

University Relations



Kelly Noll is a Chartered Financial Analyst and Managing Director at GBQ Capital Advisors. After graduating from Ohio University, she began her career in banking at PNC and pivoted to business valuation nearly 20 years ago. She loves helping clients understand the valuation process and seeing them succeed in increasing their business value.

What got you into your investment/financial services career?

I have always loved finance. My mom was a math teacher and my dad was an accountant, so growing up I enjoyed learning how money works and how it can be used as a tool for good. Later when I studied at Ohio University, I was part of a student investment group where we managed a million-dollar portion of the endowment fund in our free time. I was surrounded by like-minded finance students, and we all pushed each other to excel in our field of study. We were the only unpaid manager of the endowment fund at OU, and we generated the most alpha for the portfolio. Fast forward to today, I have been with my firm, GBQ, for almost 20 years and every day I get to apply the financial knowledge I learned at college and especially from the CFA program to my work valuing businesses.

Why do you think a CFA charter is important?

The CFA charter is the "gold standard" in the investment industry. Employers recognize the rigor that these exams require and thus having the CFA charter sets you apart from other candidates. It also gives you an advantage in your career since there is no way to pass the exams without having strong financial acumen.

What do you do in your spare time?

My husband and I have 5 children ages 2-13, so our free time is generally spending time with family and attending our kids' sporting events (largely soccer- go Ohio Premier/Whetstone Park Rangers!)

What is a fun fact many don't know about you?

I have run several marathons and almost 20 half marathons. So far, they have all been in Columbus, but I may branch out one day!

Cody Williams, CFA
Assistant Treasurer



Cody Williams is an Investment Fund Analyst at the Ohio Public Employees Retirement System (OPERS), focusing on multi-asset portfolio management and fund oversight. He has 6+ years of investment experience, beginning in San Juan, Puerto Rico as a research analyst and progressing to structuring securitized transactions. Cody holds the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations and earned a Bachelor of Science from Ohio University. He is committed to helping Columbus grow. Outside of work, he enjoys reading, running, and spending time with his dogs, Calvin and Chichi.

What got you into your investment/financial services career?

I've always loved to learn and find out about new things. In investments, there is certainly endless things to come across. That desire to learn coupled with being able to help people in so many ways pulled me to this career path.

Why do you think a CFA charter is important?

When someone has the CFA charter, it creates common points of knowledge in the industry that can be relied on. Paramount given all of the different financial products being offered.

What do you do in your spare time?

I enjoy family time, running, music and reading primarily. My fiancée and I did our first marathon together last year!

What is a fun fact many don't know about you?

My high school pal was the mascot who tackled Brutus during the OU Vs. OSU game.

Jack Miklos, CFA
Communication & Community Involvement



Jack A. Miklos, CFA, ABV, CVA, is a Supervisor on the Valuation & Transaction Advisory Services team. He advises closely held businesses on valuation, succession planning, due diligence, and strategic transactions. Jack brings clarity to complex M&A scenarios, guiding owners through both buy-side and sell-side decisions. He's especially skilled at helping family-owned businesses transition ownership across generations—balancing tax efficiency, family dynamics, and long-term business viability.

Jack's modeling and analysis provides decision-makers with a clear roadmap, whether they're preparing for a sale, planning for retirement, or evaluating growth opportunities. His approach blends technical rigor with practical insight, enabling clients to act with confidence.

Jack holds the CFA® charter, the ABV® credential, and is a Certified Valuation Analyst (CVA). He earned his B.A. in Finance Economics from Ohio Wesleyan University in 2019.

What got you into your investment/financial services career?

AP Economics in high school. I was hooked from the first class, fascinated by how markets move and how businesses create value.

Why do you think a CFA charter is important?

It gave me a broad foundation across finance disciplines. The depth of theory helps me translate complex topics into practical, non-technical language.

What do you do in your spare time?

I love to travel and backpack. This year I spent two weeks in Chile backpacking in the Patagonia Mountains and two weeks exploring Vietnam.

What is a fun fact many don't know about you?

My wife and I grew up five houses apart.

Jayant Jangra, CFA
Assistant Research Challenge



Jayant Jangra is an investment analyst with over twelve years of experience performing equity research. He is currently part of the investment team at Diamond Hill Capital Management, Inc. He holds a Bachelor's degree in engineering from Indian Institute of Technology Delhi and an MBA from London Business School.

What got you into your investment/financial services career?

Growing up, I watched my father purchase paper share certificates of various companies—some of which delivered stellar returns and helped fund my sisters' and my education. That early exposure sparked my lifelong interest in equity markets and eventually led me to a career in investing.

Why do you think a CFA charter is important?

The CFA charter plays a key role in shaping the understanding of global financial markets and emphasizes integrity, lifelong learning, and putting clients' interests first. I believe these principles are fundamental to building trust and delivering long-term value in the investment profession.

What do you do in your spare time?

I am a constant learner by nature. You can always find me trying to pick up a new skill in my free time.

What is a fun fact many don't know about you?

I have lived in five countries, an experience that has fostered my curiosity and global perspective.

Mentorship Program Update

We're thrilled to announce the launch of our 2025–2026 Mentorship Program! Applications are open until October 25, don't miss your chance to be part of this transformative experience.

What is the mentorship program?

This program connects aspiring investment professionals—students and early-career individuals enrolled in the CFA Program—with seasoned CFA charterholders. It's designed to foster professional growth, broaden industry perspectives, and build meaningful connections.

For more information, please refer to the CFA Society Columbus Mentorship Program webpage:

<https://www.cfasociety.org/columbus/society-news-resources/new-page>

What are the benefits of the program?

For mentees, the program enables opportunities to learn about career paths, gain new perspectives on the industry, and obtain long-term skill development advice from more seasoned professionals.

For mentors, the program provides a good opportunity to cultivate coaching, communication and leadership skills that are portable across one's career. It also affords a chance to give back to the investment community and to make a positive impact on the next generation of professionals within a structured framework, and over a defined period.

What is my time commitment?

Mentors and mentees should meet 4-6 times during the program's duration.

There will also be mentor-specific programming, including social events and career-building events.

Eligibility Requirements

Mentors must be an active CFA Society Columbus member and have at least 8 years of work experience (or otherwise at the Committee's discretion). Mentees can be enrolled students or early professionals enrolled in the CFA Program.

Apply Today!

Apply online: <https://www.cfasociety.org/columbus/society-news-resources/new-page>

Annual Sponsorship Opportunities 2026

Why sponsor the CFA Society Columbus?

- Contribute to great programming all year that benefits your company's employees
- Foster brand awareness among local CFA charterholders
- Demonstrate your shared commitment to the CFA Institute's mission of advancing ethics, market integrity, and professional standards of practice, which collectively contribute value to society
- Generate interest among your employees in society events and becoming a charterholder

Sponsorship tiers

For additional information, contact [Chi Nguyen, CFA](#) and [Colin White, CFA](#) @ cfacolumbus.info@gmail.com

Annual Corporate Sponsorship Levels ¹	Platinum \$25,000	Gold \$10,000	Silver \$5,000	Columbus \$2,500
Promotion of your thought leadership on our website and in monthly emails and quarterly newsletter	Up to 12/year	Up to 6/year	Up to 4/year	N/A
Promotion of your events (e.g., webcasts, CE webinars) on our website and in emails	Up to 12/year	Up to 6/year	Up to 4/year	N/A
All-access passes to events for your employees ²	5 passes	3 passes	2 passes	N/A
Forecast Dinner guest tickets	10	5	3	N/A
Golf team pass for annual golf event	2 teams	1 team	N/A	N/A
Signage on holes for annual golf event	3 holes	2 holes	1 hole	N/A
Introduction of sponsors during dinners and luncheons	X	X	X	X
Prominent display of your firm name/logo at society events as an annual sponsor	Logo/Name	Logo/Name	Logo/Name	Name
Prominent placement of your firm name/logo in all society emails	Logo/Name	Logo/Name	Logo/Name	Name
Prominent placement of your firm name/logo on our society webpage	Logo/Name	Logo/Name	Logo/Name	Name

Additional Sponsorship Opportunities:

Table sponsorship at an event:

- Dinner table sponsorship: \$1,500, including 8 meals and drinks, & firm logo displayed on the table
- Luncheon table sponsorship: \$900, including 8 meals, and a firm logo displayed on the table
- Sponsored Happy Hour: \$1,000 fee plus the cost of the event

Mentorship Program Sponsorship:

- Two sponsorship spots at \$2,500 each, directly supporting the mentorship program

Thank you, society sponsors!

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INVESTED IN THE LONG RUN

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cerberus  **Dimensional**

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