



2026 Annual Review

June 2026

cfasociety.org/Stamford

As we conclude another successful year at CFA Society Stamford, I would like to thank our members, sponsors, volunteers, and Board for their continued support and engagement. Your participation is what makes our Society a vibrant and valuable community for investment professionals across Fairfield and Westchester Counties.



This year was marked by growth, meaningful connections, and high-quality programming. We maintained a strong **membership of over 700 professionals**, welcomed **28 new CFA Charterholders**, and **hosted 17 events** that brought together members to learn, network, and exchange ideas. From discussions on artificial intelligence, private markets, and portfolio management to career development and social events, our goal has been to provide practical insights that help members grow professionally and stay connected to industry trends.

One of the highlights of the year was our **24th Annual Forecast Dinner**, which attracted **more than 160 attendees** and featured a thought-provoking discussion on artificial intelligence and its impact on the investment industry. We also continued our commitment to developing future talent by **supporting five local university teams** in the CFA Institute Research Challenge, helping students gain valuable real-world investment experience.

The strength of our Society is also reflected in the support of our sponsors. This year, we expanded our sponsorship program to a **record 14 organizations**, enabling us to deliver more programming and member benefits than ever before. Our growing digital presence, **now exceeding 600 LinkedIn followers**, has further enhanced our ability to connect with members and the broader investment community.

As we look ahead, our focus remains on delivering relevant content, expanding networking opportunities, supporting the next generation of investment professionals, and ensuring that CFA Society Stamford continues to be a trusted resource throughout your career.

Thank you for being part of our community and for helping make this such a productive and rewarding year. We look forward to seeing you at future events and continuing to grow together.

Warm regards,

Kanna Sriskanthan, CFA
President
CFA Society Stamford

FY26 Programming

Over the past year CFA Society Stamford hosted a combination of 17 virtual and in-person events. The Programming Committee worked to bring you the content and programs you requested – focusing on delivering programs that enhanced your knowledge, skills and professional & career development.

[Read more and view our Past Events.](#)

CFA Society Stamford Programming Events/Webinars

22 August 2025	Annual Summer Social (Crab Shell Restaurant)
12 September 2025	Oil Prices as a Predictor of Stock Market Returns (David Ranson Webinar)
24 September 2025	Career Value of the CFA Charter (UConn Stamford)
25 September 2025	Unlocking Liquidity: The Evolution of Private Equity Secondaries (Carlyle)
23 October 2025	Research Challenge Kick-off (Virtual)
23 October 2025	Expanding Assets to Alternative Investments (Mercer/CAIS)
13 November 2025	Wine Tasting (New Canaan Wine Merchants)
17 November 2025	Career Value of the CFA Charter (University of Bridgeport)
3 December 2025	Private Credits US (Markets Group)
4 December 2025	Holiday Party & New Charterholder Event (Tutti Pazzi Restaurant)
5 February 2026	Tax-Advantaged Solutions for Diversifying Concentrated Stock Positions (Tutti Pazzi Restaurant)
12 February 2026	Emerging Leaders Group Social (Rikos Darien)
26 February 2026	Research Challenge Local Finals (UConn Graduate Center)
19 March 2026	2026 Forecast Dinner (Rockrimmon CC)
23 April 2026	Becoming Your Own Best Ally - Career Event (Rikos Darien)
27 May 2026	Making AI Work for You (Webinar)
11 June 2026	Annual Member Meeting (Rockrimmon CC)



**CFA Society
Stamford**

FY26 By The Numbers

702
ACTIVE MEMBERS

17 PROGRAMMING
EVENTS
698 Total
Attendees

TOP 5 EMPLOYERS

(As of May 2026)

- Bank of America Merrill Lynch
- FactSet ResearchSystems
- Morgan Stanley SmithBarney
- State Street Corporation
- JP Morgan Chase

28 NEW
CHARTERHOLDERS

5 LOCAL
TEAMS
IN FY26 RESEARCH
CHALLENGE

TOP 5 MEMBER OCCUPATIONS

(As of May 2026)

- Portfolio Manager
- Accountant/Auditor
- Research Analyst, Investment Analyst
- Financial Adviser/Planner/Wealth Management
- Trader

ANNUAL FORECAST DINNER

OVER
160
ATTENDEES

600
LINKEDIN FOLLOWERS



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Programming Highlights

Expanding Access to Alternative Investments

We had a great crowd on hand to listen to our panelists share best practices, insights, and actionable approaches to differentiating your firm through effective alternative investment offerings. Always a great night at Riko's!

**Expanding Access to
Alternative Investments:**
Strategies for Wealth Management
Firms to Set Themselves Apart

23 October 2025 | 6:00 PM | Riko's Darien

CFA Society
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37
ATTENDEES



Programming Highlights

Holiday Party & New Charterholder Ceremony

It was a festive evening indeed as we celebrated the season and our 2025 New Charterholders.



53
ATTENDEES

**HOLIDAY PARTY &
NEW CHARTERHOLDER
CEREMONY**

4 December 2025
6:00 - 8:00 PM
Tutti Pazzi Restaurant



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Programming Highlights

2026 Forecast Dinner

CFA Society Stamford's 2026 Forecast Dinner was held on March 19th. This was the 24th year we held this premier networking event, bringing together leading investment and financial professionals in Westchester and Fairfield Counties.

This year's keynote speaker was Jeff McMillan, founder of McMillan AI and former Head of Firmwide AI, Morgan Stanley, in conversation with Paul Sweeney, Co-Host of "Bloomberg Surveillance" and "Bloomberg Markets AM."



2026 Forecast Dinner
19 March 2026 | 5:30 PM
Rockrimmon Country Club



KEYNOTE SPEAKER
Jeff McMillan
Founder, McMillanAI and
former Head of Firmwide AI,
Morgan Stanley



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Thanks to all for a great society year.
We look forward to seeing you soon!





**CFA Society
Stamford**

Thank You

From Your FY26 Board and Staff

OFFICERS & DIRECTORS 2025-2026

PRESIDENT: Kanna Sriskanthan, CFA

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Our 2026 Partners

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