ABOUT CFA SOCIETY MILWAUKEE

CFA Society Milwaukee promotes the highest ethical standards and professional excellence within the local investment community. CFA Society Milwaukee is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisors and other financial practitioners, that has served CFA charterholders and CFA Program candidates locally since 1955.

Our mission is to lead and grow the investment profession locally by promoting ethical behavior, supporting professional development, and providing fellowship for the benefit of members, candidates, investors, educational institutions, and the community.

Our vision is to have the CFA designation in our region as the leading credential for investment professionals. The combination of a leading credentialing program, exceptional continuing education opportunities, active awareness initiative, and an engaged membership will be our tools in achieving this vision.

CFA Society Milwaukee is a member society of CFA institute. There are over 160 CFA societies around the world that support the mission of CFA Institute at a local level and provide members with career growth, information exchange, and professional networking opportunities.

FACTS & FIGURES

- Number of CFA members globally – 200k+
- CFA Local Societies – 158+
- CFA Milwaukee Members - 681
- Number of local CFA candidates – 212
- Top occupations of members – Portfolio Manager, Investment Analyst
- CFA Society Milwaukee was established in 1963

AT A GLANCE

97% Charterholder Member

90 % Male Members

10% Female Members

57.5 Average Member Age

Education | Career Center | Networking | Professional Development | Member Directory

CFA Society Milwaukee

CFA SOCIETY MILWAUKEE

BENEFITS OF SOCIETY MEMBERSHIP

As a member of a truly global organization, with a local focus you can:

- Be part of a collective global voice for protecting the interests of the profession
- Stay abreast of relevant topic and trends that affect the industry in your market
- Take advantage of continuing education opportunities
- Explore CFA Program scholarship opportunities

MEMBERSHIP REQUIREMENTS

Charterholder Member

- Member of CFA Institute and CFA Society Milwaukee
- 4000 hours of relevant work experience over 36 months
- Passed all three levels of the CFA Program
- Professional references

Professional Member

- Member of CFA Institute and CFA Society Milwaukee
- 4000 hours of work experience
- Pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct
- Hold a bachelor's degree or equivalent
- Pass Level 1 of the CFA exam, Level II CIPM or pass the self-administered Standards of Practice Exam

REFERENCES

Three professional references are required with your application. If one of your references is from a regular member of CFA Society Milwaukee, then only two professional references are required. References from your supervisor(s) are preferred.

VOLUNTEER OPPORTUNITIES

Get even more out of your society membership by volunteering to serve on a society committee, running for an officer position, or serving on the board. You will develop valuable leadership skills, gain prominence in the investment profession outside your normal work roles, and realize additional networking and relationship-building opportunities.

JOIN CFA SOCIETY MILWAUKEE

Charterholder, Professional & Affiliate Society Membership Dues: $125

Charterholder, Professional & Affiliate Professional Leave Dues: $50

CFA Institute Membership: $299

For full information visit our membership page, or to apply for membership, visit CFA Institute's website.

EVENTS & PROGRAMMING

- Annual Outlook Dinner
- New Charterholder Event
- CFA Institute Research Challenge
- Continuing Education Programs

INITIATIVES

Education
Programming
Financial Literacy Initiative
Women in Investment Management

Education | Career Center | Networking | Professional Development | Member Directory

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