



2019 FACT SHEET

ABOUT

CFA Society Alabama is a statewide organization that operates with the goals of creating a community of investment professionals in Alabama, advancing ethics and standards in the industry, and increasing awareness of the CFA Charter.

LEADERSHIP

OFFICERS

Andy Webb, CFA
President

Jason Murray, CFA
Vice President

Trey Cartledge, CFA
Treasurer

Michael Adair, CFA
Secretary

BOARD OF DIRECTORS

William Aycock, CFA

Stephen Daniels, CFA
(Immediate Past President)

Lucas Fitts, CFA

Johan Grah, CFA

Adrian Hughes, CFA

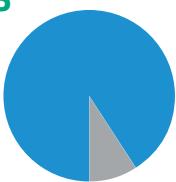
Justin Mayfield, CFA

Adam Rogers, CFA

STATISTICS

217

Active members



94%

Charterholders

Top 3 cities

represented



Top 5 job functions

38%



Portfolio Manager

13%



Research Analyst

9%



Financial Advisor

8%



Chief-level Executive

7%



Consultant

Top employers represented

Regions Financial

31

Protective Life

13

Highland Associates

11

Retirement Systems of Alabama

10

Vulcan Value Partners

9

BBVA Compass

7

Stifel; Welch Hornsby & Welch

5

Harbert Management; Porter, White & Company;
Synovus; Warren Averett

4

EVENTS

Each year, CFA Society Alabama strives to deliver a diverse line-up of high caliber speakers and local networking events. In 2018-2019, the Society hosted 12 events, including: 8 monthly luncheons, a CFA Night at the Barons baseball game, new charterholder recognition dinner, Birmingham Financial Alliance joint social, and Annual Forecast Dinner at the Barber Motorsports Museum.

SCHOLARSHIP

CFA Society Alabama, with support from CFA Institute, provides financial assistance to CFA candidates through the CFA Access Scholarship program. This program supports several students each exam cycle by reducing the enrollment fee for qualifying applicants. Additionally, our Society supports students at those Alabama colleges and universities participating in CFA Institute's University Affiliation Program.

MEMBERSHIP

Membership is open to CFA charterholders and candidates enrolled in the CFA Program who are actively pursuing the Chartered Financial Analyst designation. Dues are \$100 annually for regular and affiliate members, and \$50 annually for retired members. Membership benefits include: professional development, advocacy, networking opportunities, and education.

ABOUT CFA INSTITUTE

MISSION

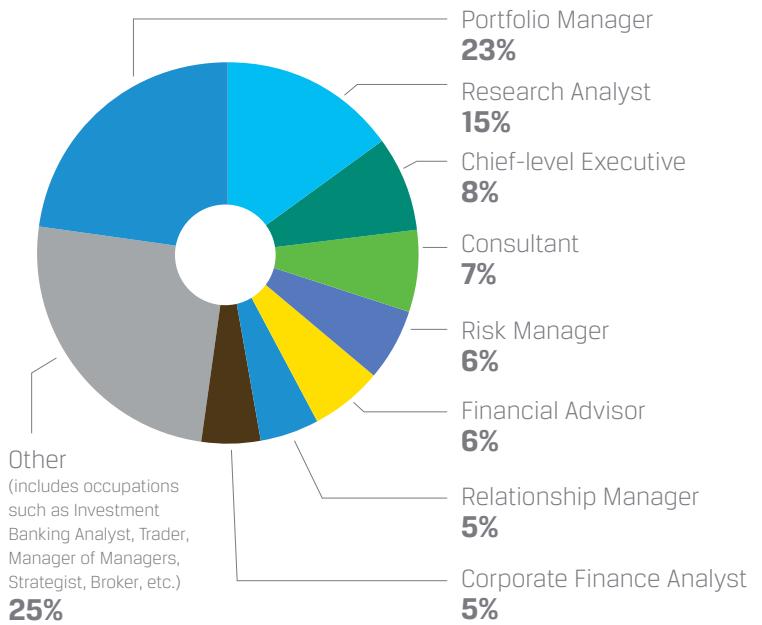
CFA Institute is a global community of investment professionals working to build an investment management industry where investors' interests come first, financial markets function at their best, and economies grow.

We advocate for financial market integrity and develop and promote ethical and professional standards, such as the Global Investment Performance Standards (GIPS®) and the Asset Manager Code of Professional Conduct™, and our members uphold our industry-leading Code of Ethics and Standards of Professional Conduct.

CFA INSTITUTE STATISTICS

- More than **164,000 members** in **164 countries**
- More than **157,000 CFA charterholders** globally
- **158 local societies worldwide**
- GIPS® Standards championed locally in more than **40 countries**
- **>1,300 firms** adhere to the Asset Manager Code of Professional Conduct

TOP OCCUPATIONS OF MEMBERS GLOBALLY



BECOMING A CHARTERHOLDER

The Chartered Financial Analyst (CFA) credential is the most respected and recognized investment management designation in the world. The curriculum covers academic theory, current industry practice, and ethical and professional standards to provide a strong foundation of advanced investment analysis and real-world portfolio management skills. A work experience requirement and an annual ethics statement ensure career-long professional excellence by those who have earned the CFA Charter. To find out more about the CFA Charter, please visit www.cfainstitute.org/cfaprogram.

CONTACT US

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FIND US

Website: cfasociety.org/alabama



@CFAofAL



CFA Society of Alabama
Group Page