



CFA Society
San Diego

Mentorship Kick-off event



CHANDLER ASSET MANAGEMENT

NOVEMBER 10, 2025

MENTORSHIP KICK-OFF EVENT

Speakers



Stanley
Martinez
Vice President

+1.619.533.6253
programs@sandiego.cfasociety.org



Aaron
Nail
Mentorship Committee

+1.800.317.4747
anail@chandlerasset.com

Mentorship Kick-off

Why Mentorship? 4

Program 5

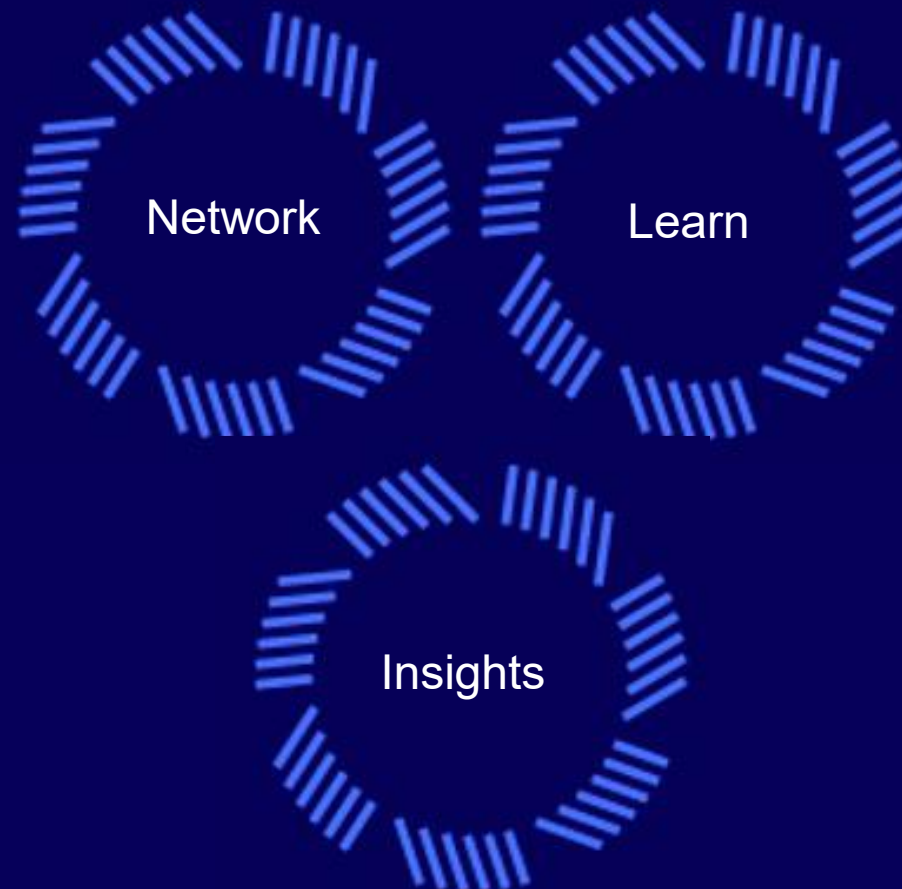
Next Steps 7

MENTORSHIP KICK-OFF EVENT

Why Mentorship?

At the intersection of continuous learning, professional development, and stronger financial community.

Meets CFASD's mission to serve the needs of all local investment decision makers seeking the highest standards of professionalism and ethics.

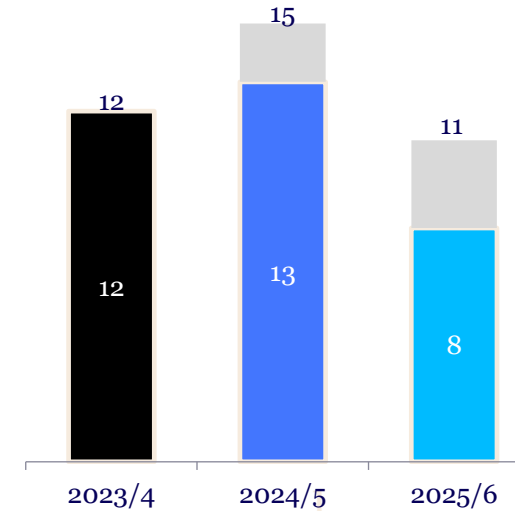


Program

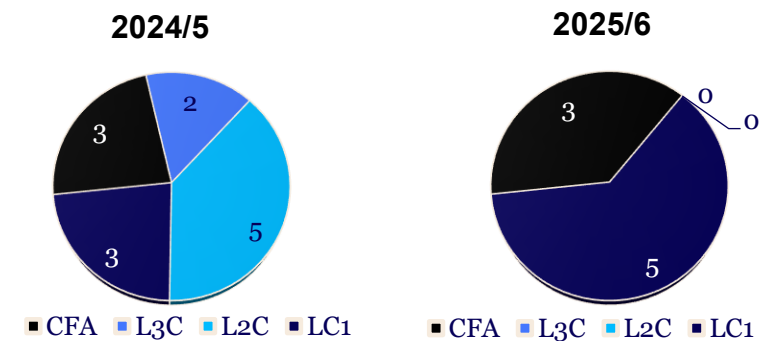
Through the years

- 1) Decreased applications, consistent with lesser program attendance, exam prep registration, and Society membership (y-o-y).
- 2) More bifurcated between Charterholders and L1 candidates this year.

Applicants



Mentees

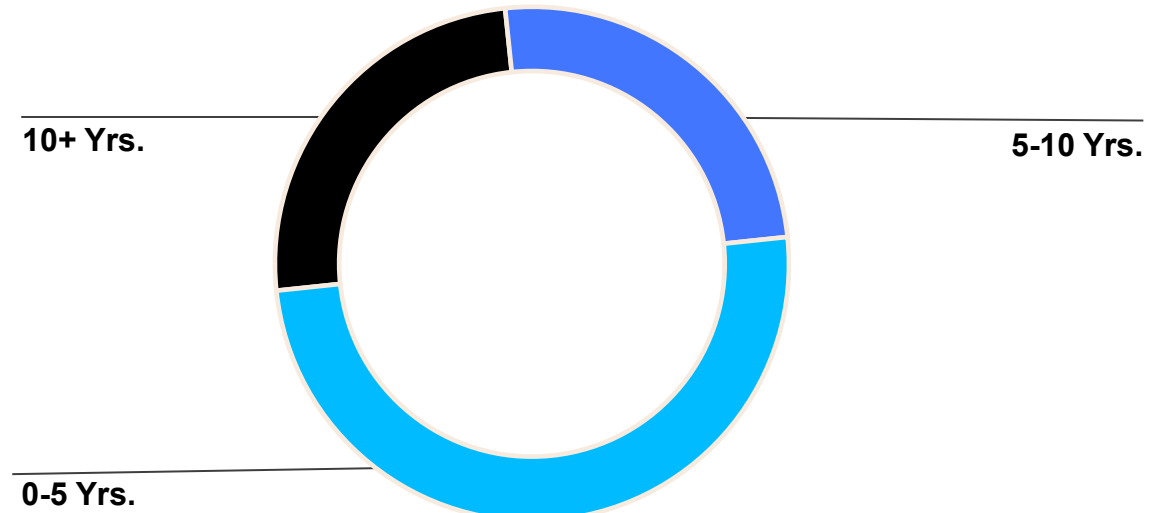


Program

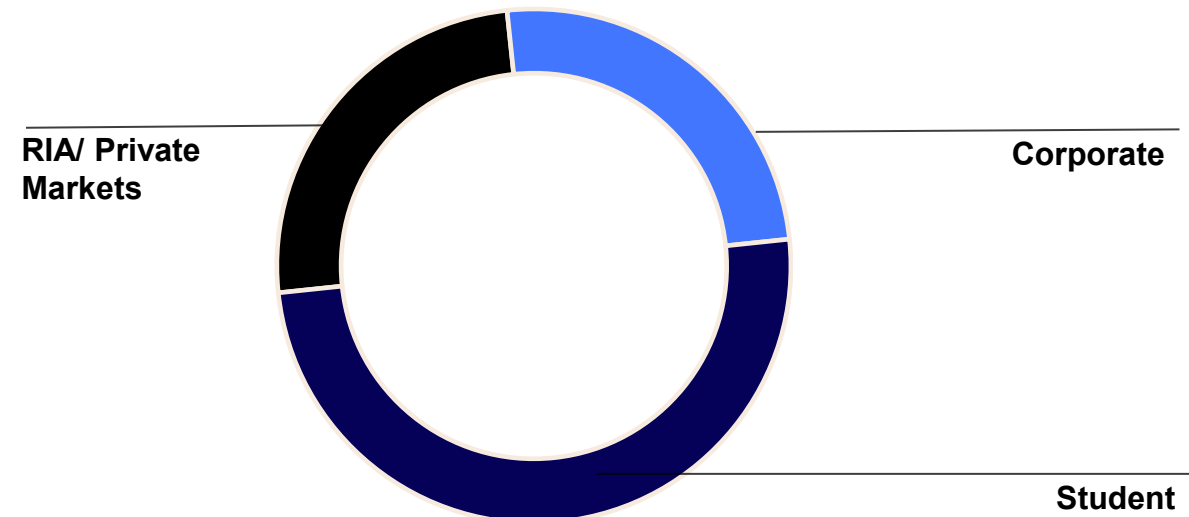
Meet the Mentees

Median is a Level 2 CFA® candidate with 6 years professional experience seeking to explore a transition to experience in equity analysis, project finance or wealth management.

Professional Experience



Occupations



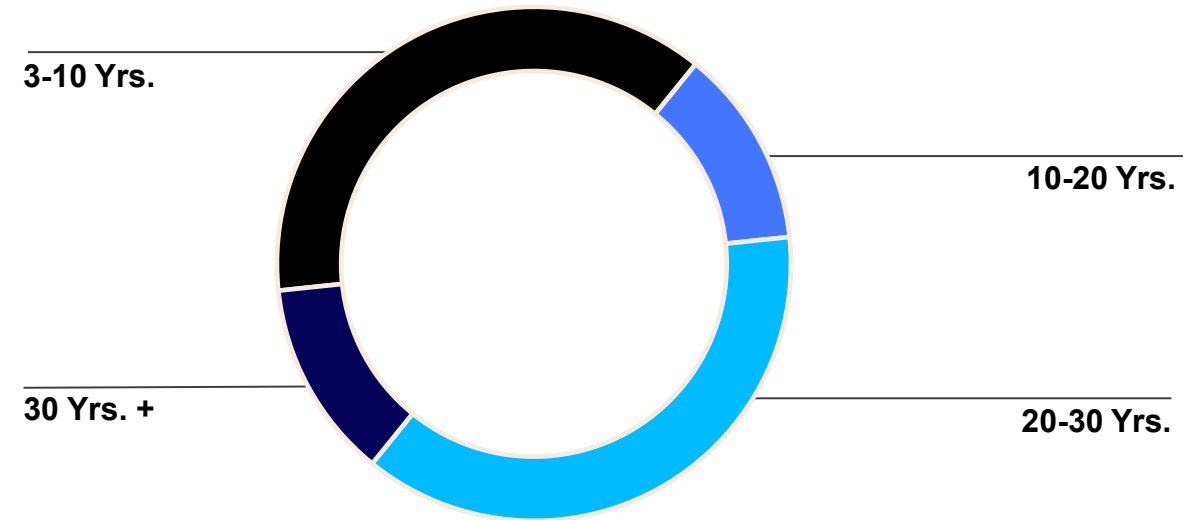
MENTORSHIP KICK-OFF EVENT

Program

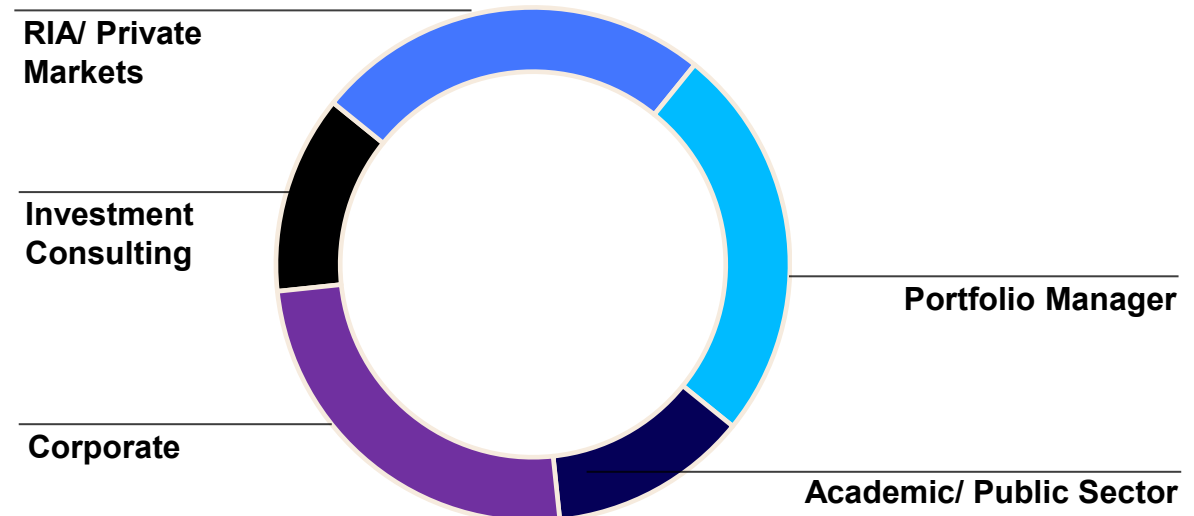
Meet the Mentors

Median is a CFA® Charter holder with 19 years professional experience who works in a front-line position and has transitioned careers within related fields at least once.

Professional Experience



Occupations



Next steps

Information: 411

4

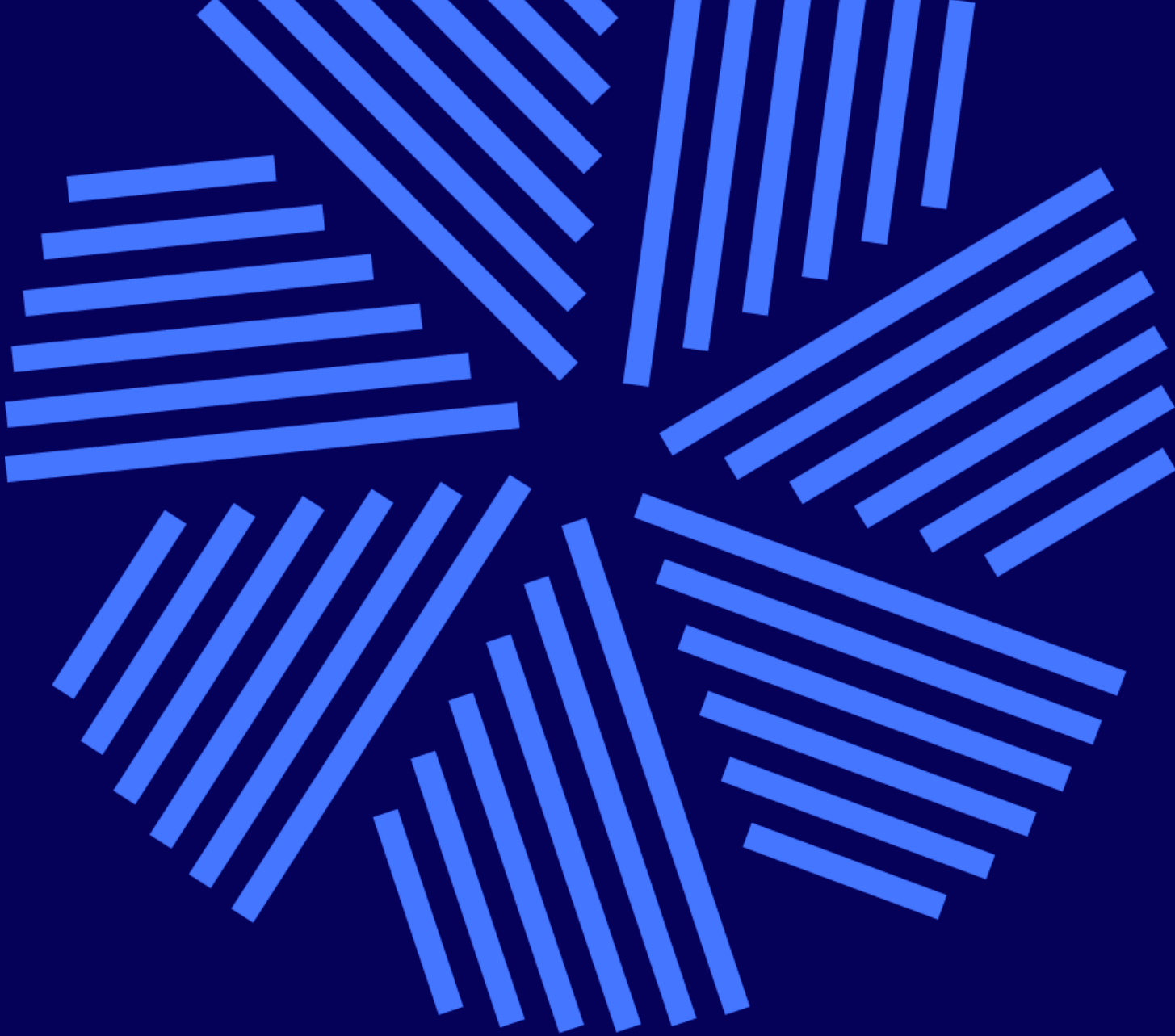
Meetings (minimum) between Mentors and Mentees, self coordinated.

1

Voluntary joint attendance at a program close event in May 2026, date and venue TBD.

1

Recommended minimum joint attendance at CFASSD event.



“Mentorship helps fulfill CFASD’s vision to be the trusted voice of San Diego’s investment community for all its professionals seeking higher standards of knowledge and ethics.”

Thank you