

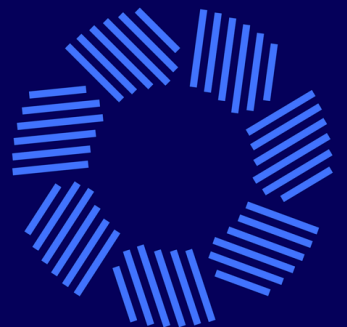


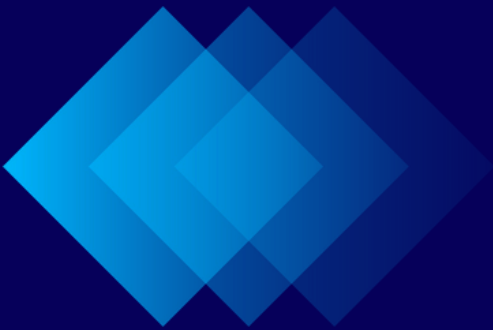
**CFA Society  
New Mexico**

# **2024-2025 ANNUAL REPORT**

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CFA Society New Mexico





# MISSION, VISION & OBJECTIVES

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## Strategic Plan

The society seeks to fulfill its mission by:

- To develop future professionals through assisting CFA exam candidates and college students to pursue credentialing and careers in investment management and analysis.
- To deliver member value that accelerates the professional success of our members.
- To build market integrity that benefits investors and our members that serve them

As one of CFA Institute member societies, our society connects members to global network of investment professionals.

## Mission

To lead the investment profession in the State of New Mexico by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

# CFA Society New Mexico Leadership



President  
Andrew Hockey



Secretary  
Di Zhou



Treasurer  
Julian Serafini



Programs  
Paul Ariano



Programs  
JJ Milder



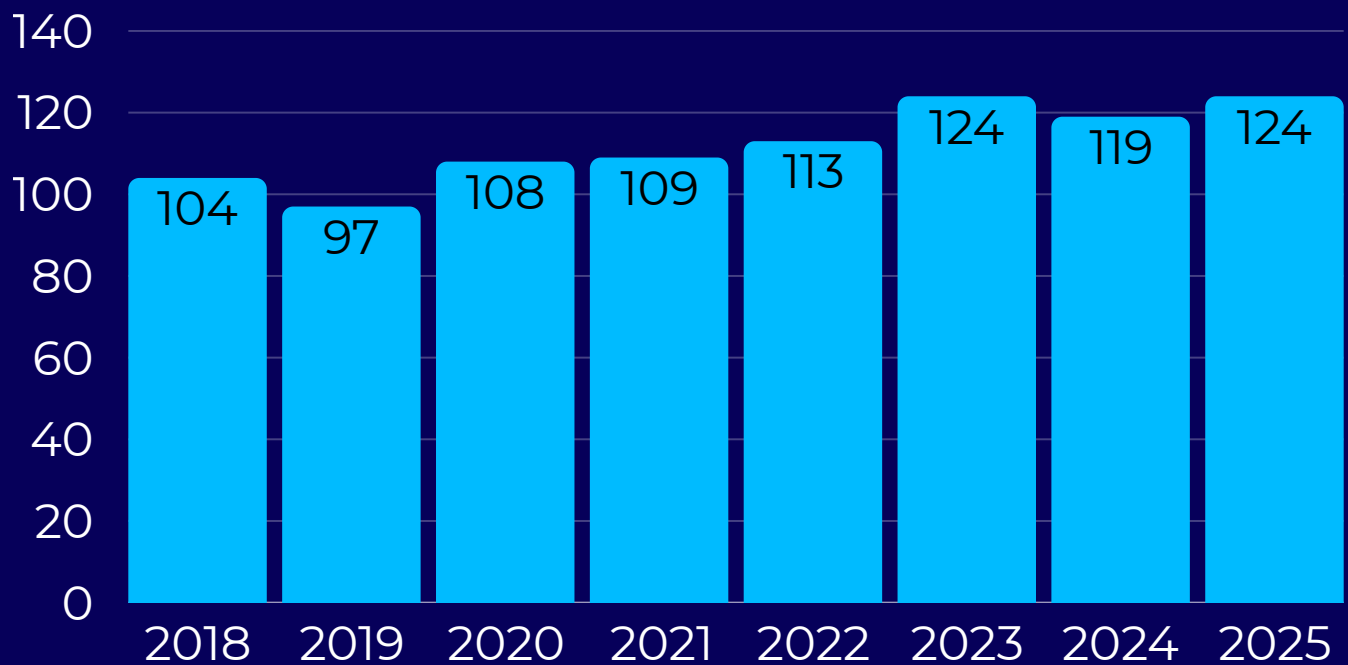
Membership  
Michael Shackelford



University Relations  
Ben Chang

# MEMBERSHIP

## CFA Society New Mexico Membership



### Collaborative WIM Initiative

The Women in Investment Management (WIM) Initiative has been at the forefront for the CFA Institute and CFA Societies worldwide. The CFA Society community around the globe has joined efforts to promote inclusion and diversity in the investment management profession. CFA Society New Mexico continues to be part of this important initiative and we welcomed all members to join the conversation, to follow the initiative on LinkedIn, and to lead the diversity dialogue alongside the incredible community of finance professionals.

### Social Media

+ 435 LinkedIn Followers (over 120 posts)

# PROGRAMS & EVENTS

- *Fall Socials* | Santa Fe Brewing Company & Capital Coal
- *24th Annual Forecast Dinner* | Bob Jacksha, Michael Shackelford, & Robert Smith
- *Spring Socials* | Santa Fe Brewing Company & CHOMP
- *Spring Social* | Las Cruces
- *2025 TopGolf Event & Annual Meeting*

# FINANCIALS

## Income Statement

Fiscal Year June 30th

2025

### Income Items

CFAI Operating Fund Support	\$12,000
Membership Dues	\$8,047
Sponsorship	\$34,173
Programming & Networking	\$1,279
Total Income	\$55,499

### Expense Items

Programming & Networking	\$32,821
Operations	\$16,632
Goverance	\$3,177
Total Expense	\$52,630

## Balance Sheet

Fiscal Year June 30th

2025

Checking	\$77,175
Investments	\$52,322
Total Assets	\$129,497
Liabilities	\$0.00
Equity	\$129,497
Total Liabilities & Equity	\$129,497



**CFA Society  
New Mexico**

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[@cfasociety-new-mexico](https://www.instagram.com/cfasociety-new-mexico)