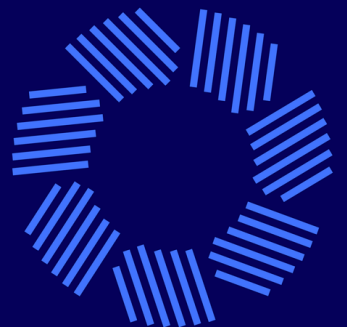




**CFA Society
New Mexico**

2025-2026 ANNUAL REPORT

CFA Society New Mexico





MISSION, VISION & OBJECTIVES

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

Julian Serafini,
CFA



Vice President

JJ Milder



Secretary

Di Zhou, CFA, FRM



Treasurer

Michael
Shackelford, CFA



Programs

Paul Ariano, CFA



Membership

Clayton Cleek, CFA



University Relations

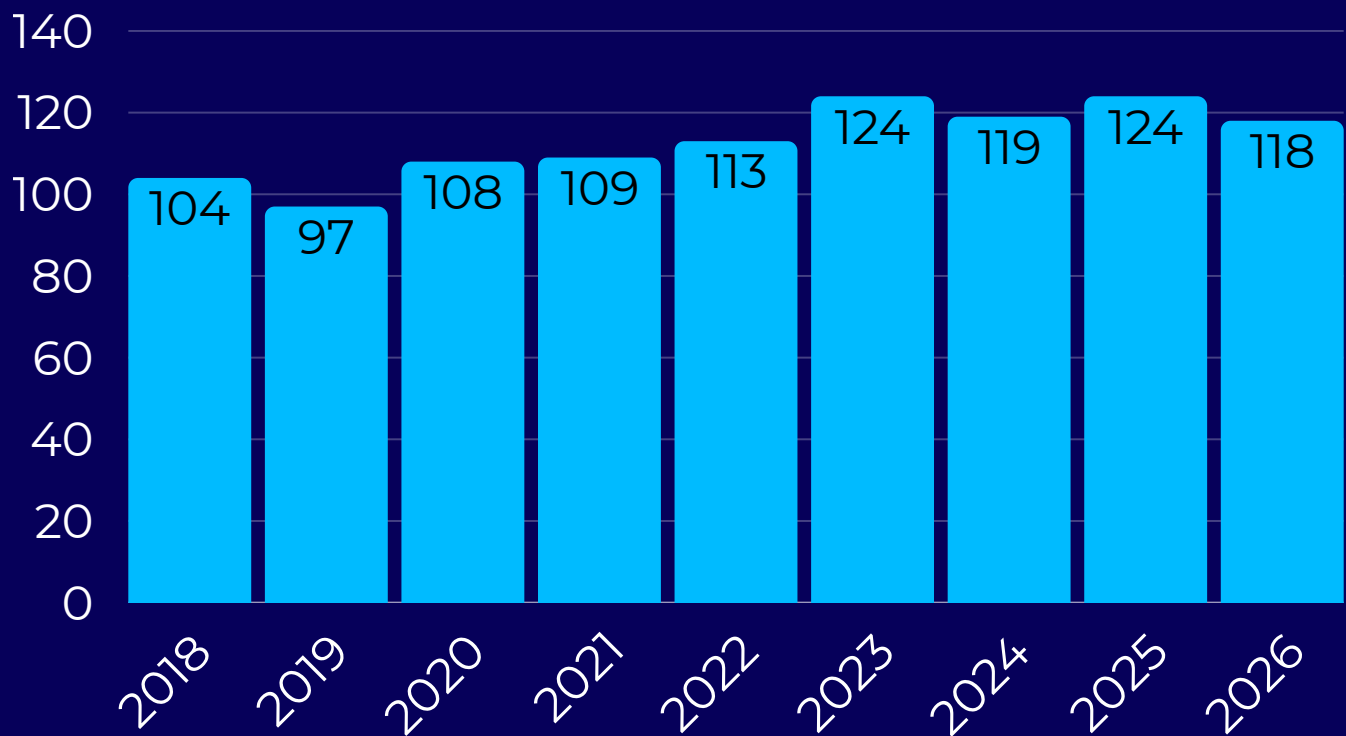
Olaleye Morohunfolu, Andrew Hockey, CFA
Ph.D., CFA



Ex Officio

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

+ 510 LinkedIn Followers (over 120 posts)

PROGRAMS & EVENTS

- *Fall Socials* | Santa Fe Brewing Company & CHOMP
- Rio Grande Research Challenge
- *25th Annual Forecast Dinner* | Peter Madsen, Frank Mihail & Jon Clark
- *Spring Socials* | Santa Fe Brewing Company & CHOMP
- *Something Big is Happening in the Emerging Markets - Virtual Event* | Kevin Carter
- *2026 Main Event & Annual Meeting*

FINANCIALS

Income Statement

Fiscal Year June 30th

2026

Income Items

CFAI Operating Fund Support_____	\$6,424
Membership Dues_____	\$10,090
Sponsorship _____	\$43,899
Programming & Networking_____	\$6,905
Total Income_____	\$67,318

Expense Items

Programming & Networking _____	\$35,705
Operations_____	\$18,623
Goverance_____	\$2,027
Total Expense_____	\$56,355

Balance Sheet

Fiscal Year June 30th

2026

Checking _____	\$88,110
Investments_____	\$52,322
Total Assets_____	\$140,432
Liabilities_____	\$0.00
Equity_____	\$140,432
Total Liabilities & Equity_____	\$140,432



**CFA Society
New Mexico**

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