

ABOUT CFA SOCIETY NEW MEXICO

CFA Society New Mexico was founded on May 23, 1998, as a member organization for CFA Institute. The society's mission is 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.

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.

CFA Institute is the premier global association for investment management professionals, with over 206,000 members in 165 countries & regions, through 157 societies.

- CFA Society New Mexico has 117 members, 93% are charterholders.
- Approximately 49% manage private assets, and 47% manage institutional assets.
- Members' occupations include: portfolio managers, chief-level executives, research analysts, financial advisors, consultants, relationship managers, strategist, traders, and more.
- The top five employers of members and candidates in the area include: Thornburg Investment Management, Public Employees Retirement Association of New Mexico, New Mexico State Investment Council, City Different Investments, and Clearstead Avalon Trust.

AT A GLANCE

- 93% Charterholder Member
- 15% Female Members
- 85% Male Members
- 43 Average Member Age



CFA SOCIETY NEW MEXICO

BENEFITS OF SOCIETY MEMBERSHIP

As a member of a truly global organization, we provide such benefits as:

- Local professional development opportunities including discount to dynamic educational programs.
- Becoming a part of an effectual and common voice to develop and protect the interest of the profession.
- Staying abreast of trends that affect the industry and our market.
- Access to CFA Society New Mexico and CFA Institute resources such as Career Center, finance journals, magazines, and other content our organizations publish.

MEMBERSHIP REQUIREMENTS

Charterholder Member

- Member of CFA Institute and CFA Society New Mexico
- 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 New Mexico
- 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 New Mexico, 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 NEW MEXICO

Charterholder, Professional & Affiliate

Society Membership Dues: \$95

CFA Institute Membership: \$299

Local Membership Dues: \$95

Candidate/Student membership Dues: Free

For full information please visit
our [membership page](#),
or to apply for membership,
visit [CFA Institute's](#) website.

