



**CFA Society  
Nashville**

# Annual Meeting

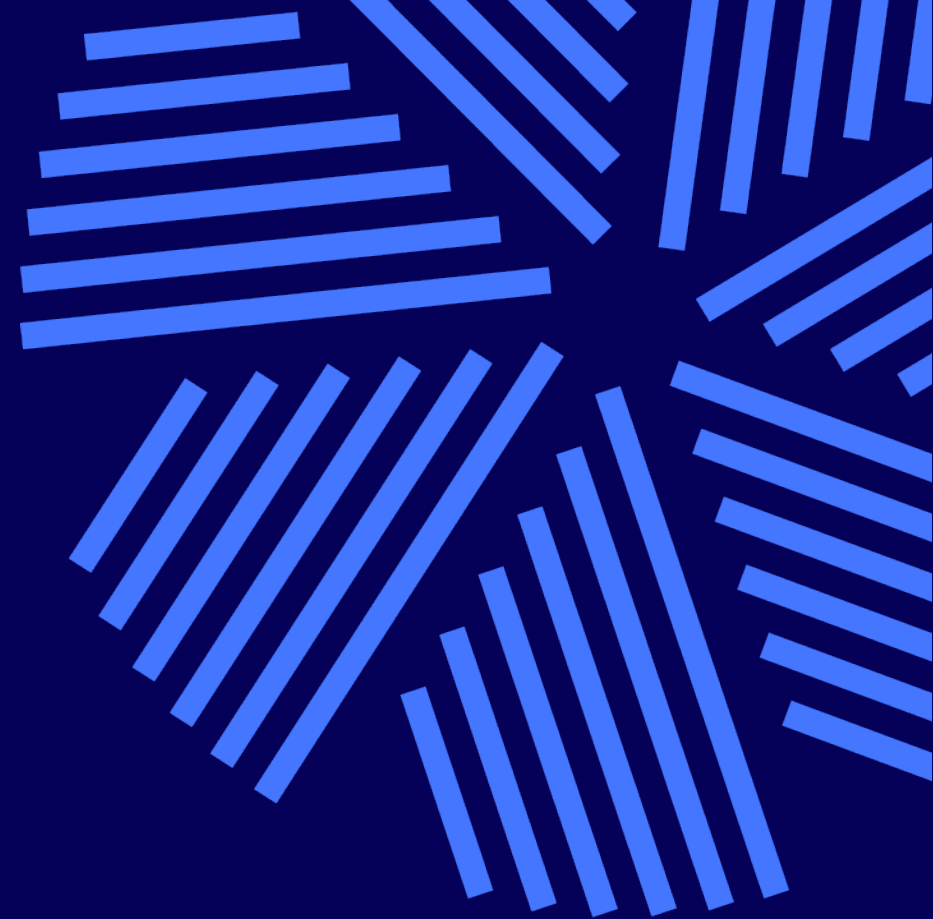
## Society Year 2023 - 2024

**Thursday, June 27, 2024**

# WELCOME

---

Ann Taylor Knotts, CFA, CFP



# AGENDA

---

Welcome – Ann Taylor Knotts, CFA, CFP

Programming – Johnny Garrison, CFA

Membership & Candidate Services – Russ Barnard, CFA

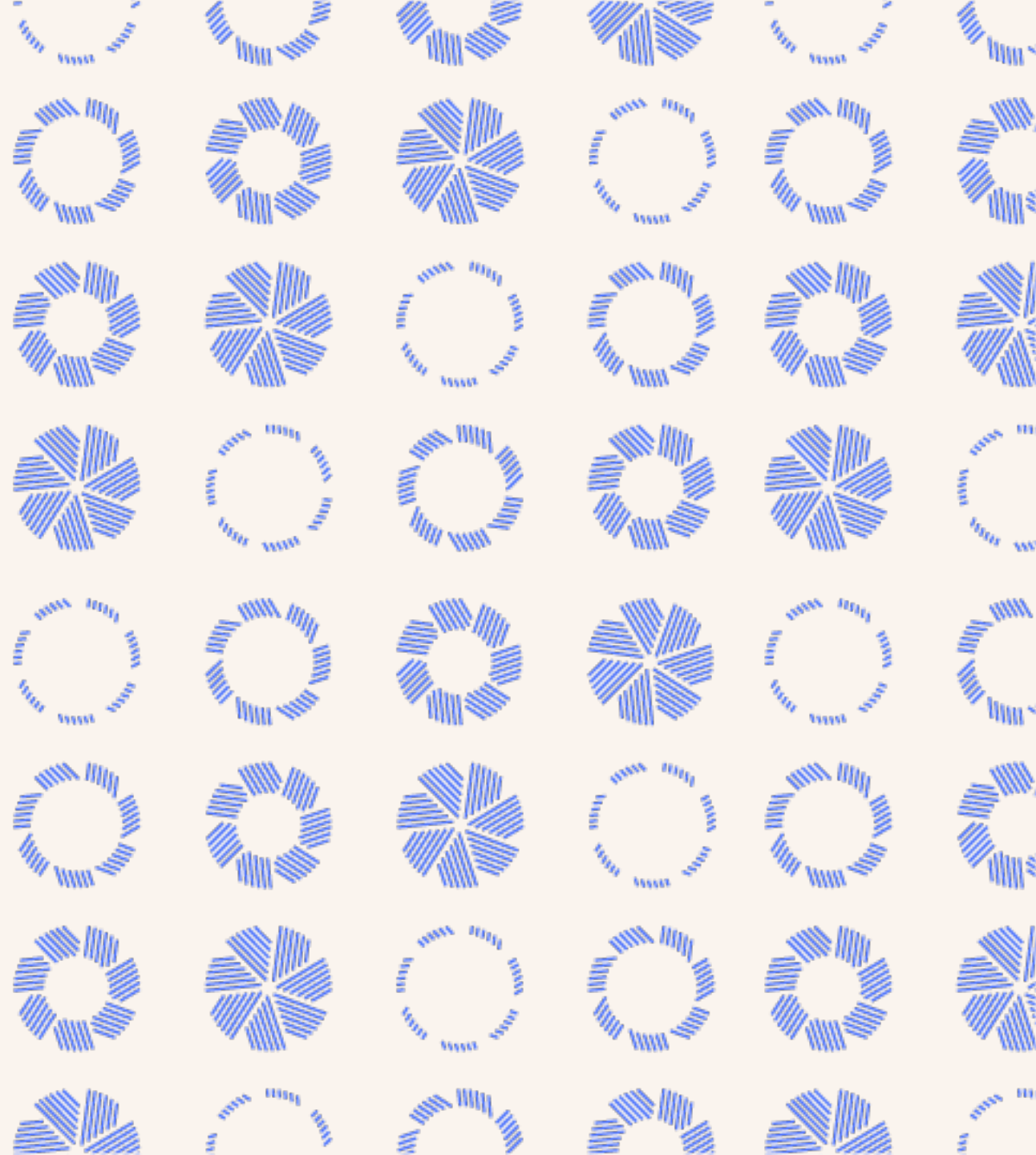
Advocacy & Community Outreach – Michell Bosch, CFA, CTP

Greater Tennessee Research Challenge – Sam Carden, CFA, CAIA

Treasurer – Austin Branstetter, CFA

New Business – Ann Taylor Knotts, CFA, CFP

Our mission is to equip members to be leaders in our community by promoting the value of the CFA designation and facilitating the exchange of ideas and resources for the ultimate benefit of Middle Tennessee.



# Strategic Objectives



---

## Member Value

Provide professional learning opportunities and member networking events



---

## Advocacy & Community Outreach

Engage our community and increase awareness among local institutions and universities



---

## Membership & Candidate Engagement

Facilitate renewal of current and lapsed members in both CFA Institute and CFA Society Nashville and support candidates through their journey

# Staff



**Angie Brown**  
Executive Director

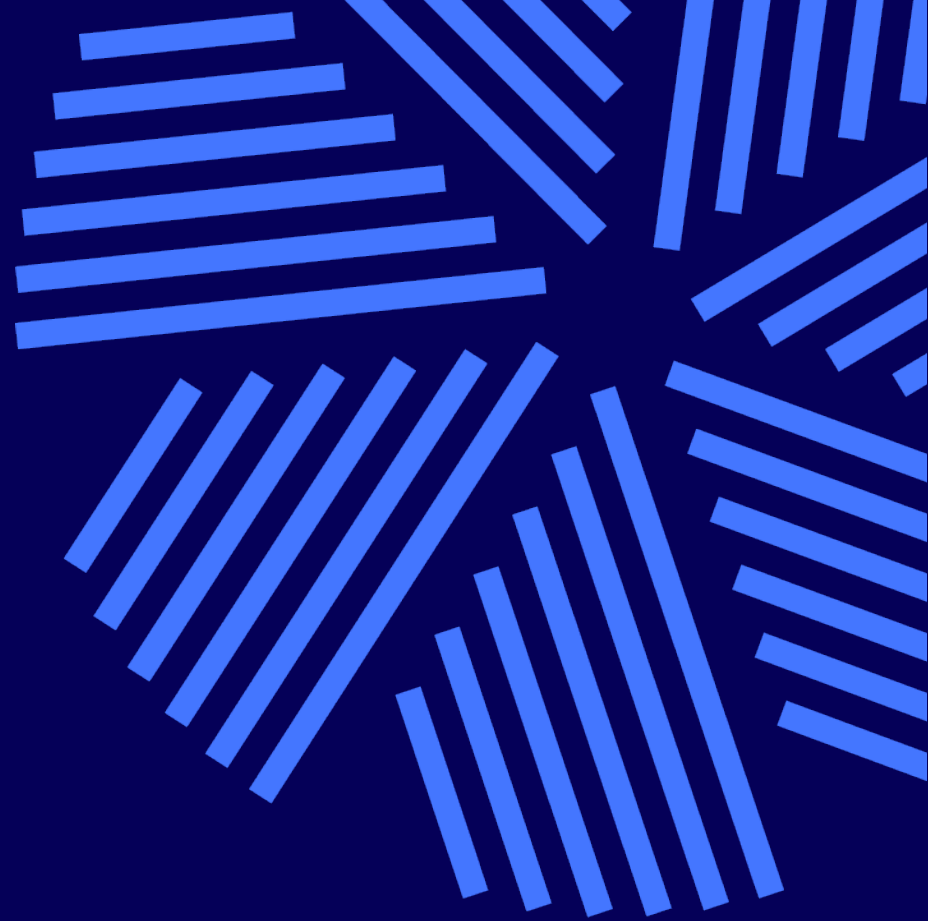


**Claire Hudson**  
Technology & Events  
Marketing Coordinator

# PROGRAMMING

---

Johnny Garrison, CFA



# 2023 – 2024 Programming Year in Review

**August 2023**

*Member Social & Brewery Tour*



**September 2023**

*Private Credit*

AllianceBernstein hosted the CFA Society Nashville to hear from Matthew Bass, Head of Private Alternatives, for a "Private Credit: Navigating a Diversified Asset Class and What Lies Ahead" event.

**October 2023**

*Mindful Decision Making*

Claire Price, Director of Operations for The Happy Hour, taught the basic tenets of mindfulness and emotional intelligence as tools to cultivate inner clarity, align with your values, and respond (not react) to what lies ahead

# 2023 – 2024 Programming Year in Review

## November 2023

### *Local Industry Spotlight – Healthcare*

Our Society heard from Navid Farzad of Frist Cressey Ventures and Teresa Sexton of Claritas Capital, two local private equity firms specializing in healthcare. Moderated by Beth Ratliff, COO of Premise Health.



# 2023 – 2024 Programming Year in Review



## January 2024

**Simona Mocuta**  
Chief Economist  
State Street Global Advisors

**Ashwin Alankar, PhD**  
Head of Global Asset Allocation  
Janus Henderson Investors

## March 2024

### *The Diversity Dividend*

Meredith Jones, an internationally recognized researcher, writer and speaker led a session that focused on the myriad of ways that diversity can positively impact investors and advisors, from creating differentiated return streams to business development opportunities.

# 2023 – 2024 Programming Year in Review

**April 2024**

## ***How Fintech Is Changing the Wealth and Retirement Investment Landscape***

How advancements in technology are providing greater access to customized wealth management and retirement services.

Panelists included: Jodan Ledford, Former Chief Executive Officer of Smart, Erko Etula, PhD, CEO and Co-Founder of Brooklyn Investment Group, and Markus Aakko, CFA, Head of Business Solutions with Bondit, and moderated by: Ronit Walny, CFA

**May 2024**

## ***Station East: Igniting Nashville's Next Chapter***

Vice President of Development at The RMR Group, Jesse Abair, will discuss Station East, a dynamic new neighborhood being developed in Nashville's East Bank by The RMR Group.

**June 2024**

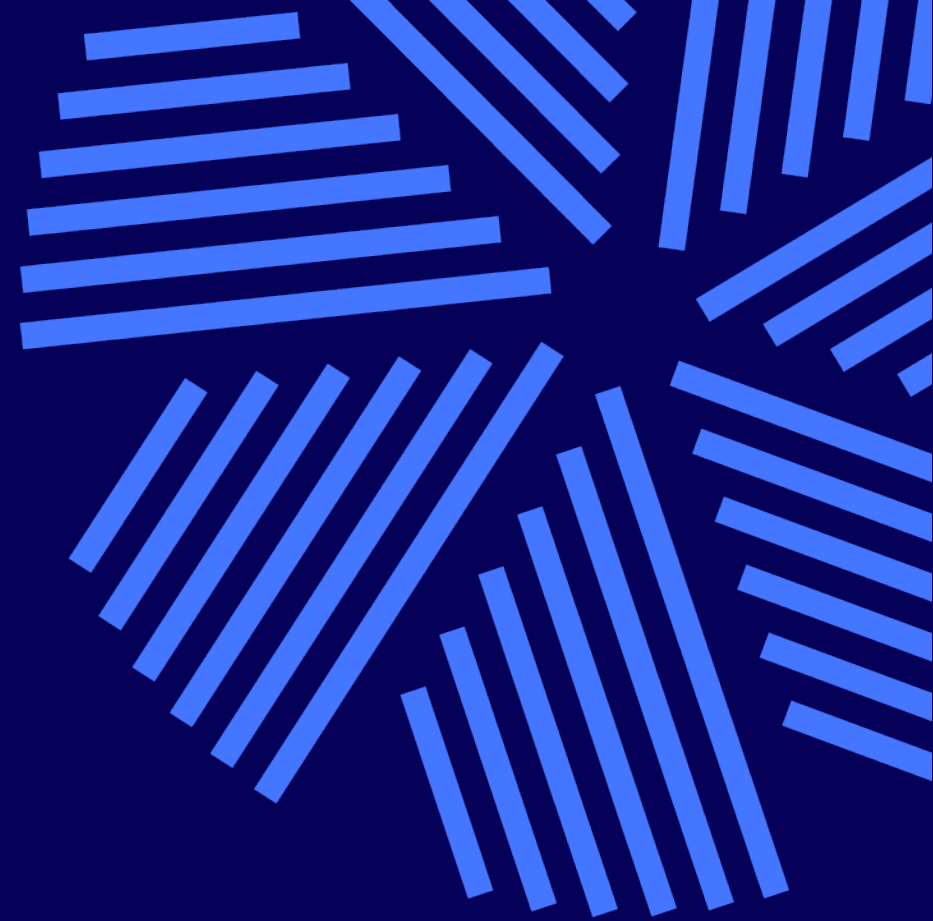
## ***Five Issues Where A View Is Better than Delegation***

CFA Society Nashville and FPA of Middle Tennessee partnered to welcome Rich Nuzum, CFA, Executive Director, Investments and Global Chief Investment Strategist for Mercer

# MEMBERSHIP & CANDIDATE SERVICES

---

Russ Barnard, CFA



# Metrics

- 401 Active Members
- +29 Members y/y or +7.8% growth
- 91% retention
- 184 candidates currently registered for exams (+16.5%)
- 101 unaffiliated members (not members of Nashville Society)

# Achievements

- Launched Mentorship Program
  - Information is available on the website under CFA® Program
- >89% (global historical average) retention
- >5% membership growth
- >5% candidate growth

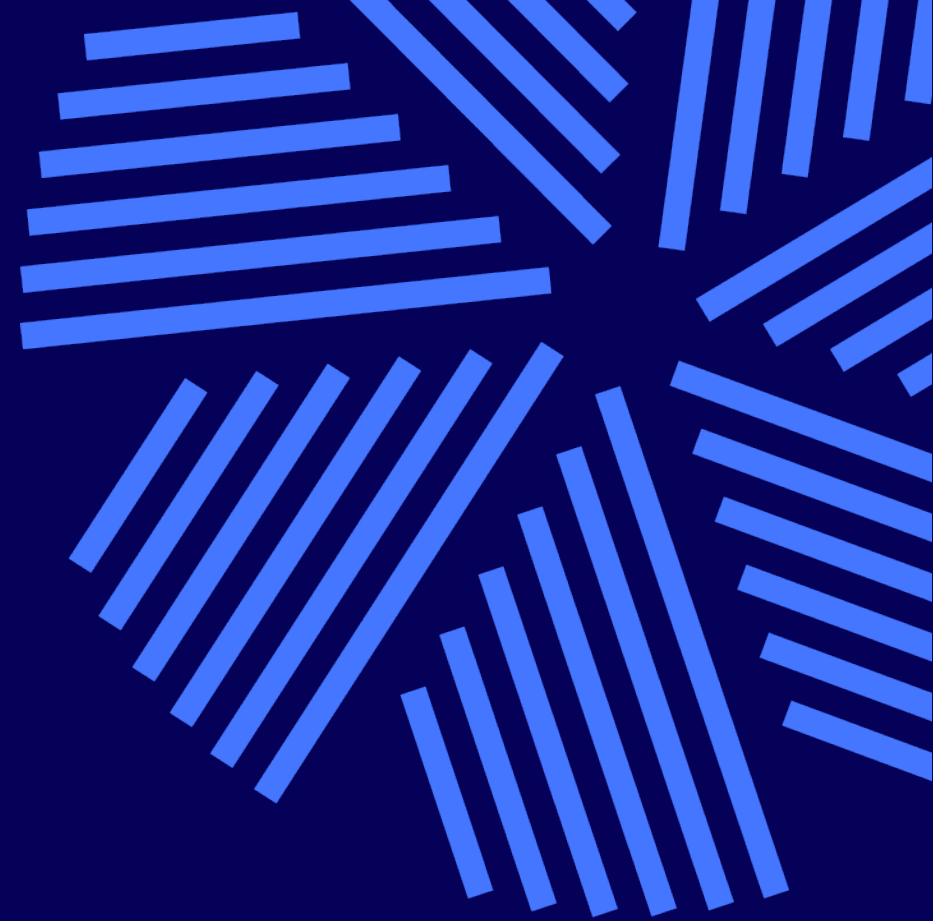
# Preliminary FY2025 Goals

- 5%= 20 Mentors participate in the new Mentorship Program
- 2%= 8 Certificates earned across the various other new programs offered by CFA Institute
- 25% of members attend at least 1 event
- >89% (global historical average) retention
- >5% membership growth
- >5% candidate growth

# ADVOCACY & COMMUNITY OUTREACH

---

Michelle Bosch, CFA, CTP



# Committee Efforts

## Main Goals

---

- Reach two new universities.
- Organize one virtual Advocacy event.
- Find a collaborative opportunities with fellow committees.
- Increase outreach to build relationships with universities and their career centers.
- Leverage current experience in committee to discuss career opportunities.
- Connect with students.

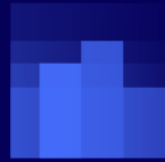


# Accomplishments



## Virtual

Completed virtual Advocacy event with Wesleyan University.



## In-Person Advocacy

Completed 2 in-person Advocacy events:

- Belmont Uni.
- Lipscomb Uni.



## Collaboration

Collaborated with Research Challenge and Supported Annual Forecast Dinner.



## Add'l Efforts

- Connected with VU professor, Career Center & Finance Club.
- Completed Career Path Presentation.



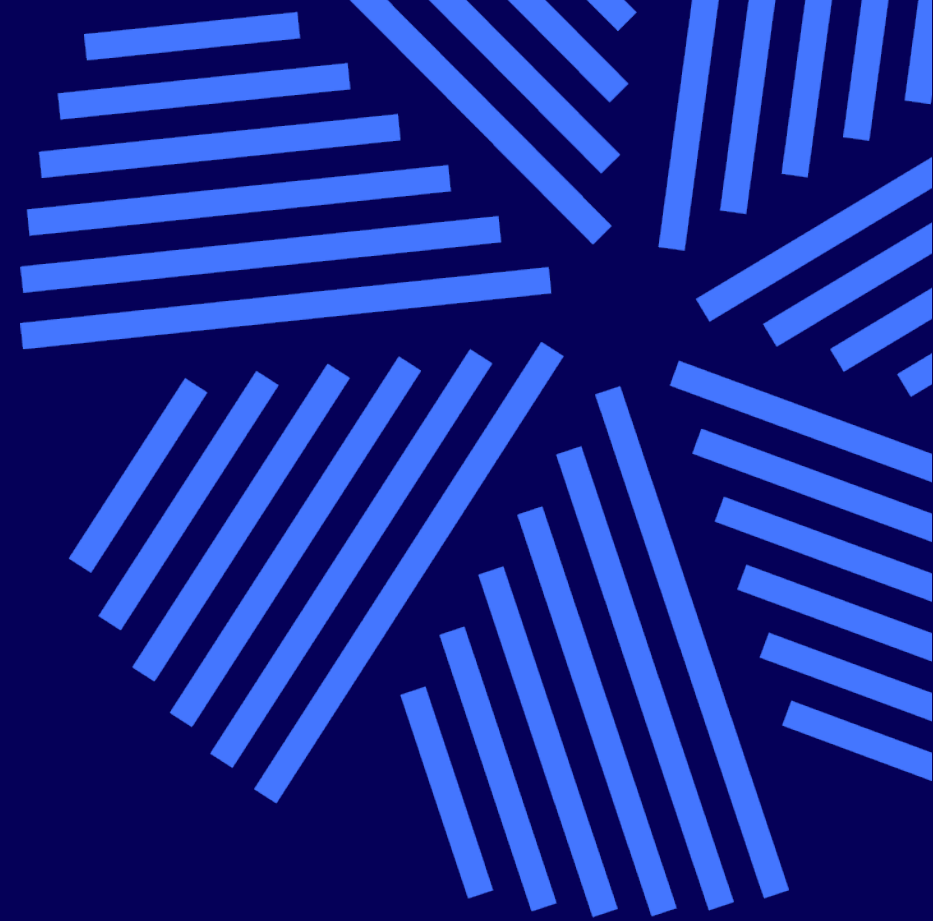
## Upcoming

- Upcoming VU presentations, July and August 2024.

# GREATER TENNESSEE RESEARCH CHALLENGE

---

Sam Carden, CFA, CAIA



## **10 PARTICIPATING UNIVERSITIES**

Belmont University

Chattanooga – University of Tennessee

Knoxville – University of Tennessee

Lipscomb University

Middle Tennessee State University

Sewanee

Southern Adventist

Covenant College

East Tennessee State University

University of Evansville

# 2024 CFA INSTITUTE RESEARCH CHALLENGE

**GREATER TENNESSEE LOCAL  
COMPETITION WINNER:  
UNIVERSITY OF TENNESSEE  
AT CHATTANOOGA**

Hunter M. Holzhauser, Ph.D., Faculty Advisor  
Ray Ryan, CFA, Industry Mentor



Ava Kelton



Blade Kisler



Trent Lowe

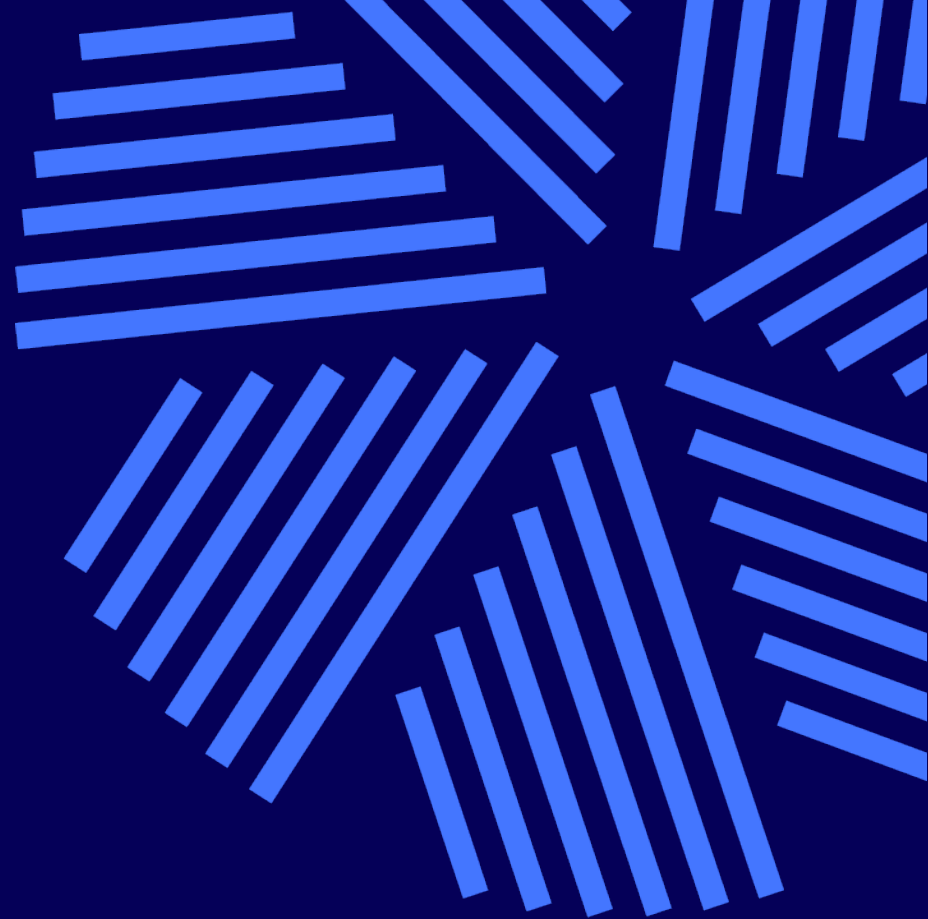


Ryan Rinker

# TREASURER

---

Austin Branstetter, CFA



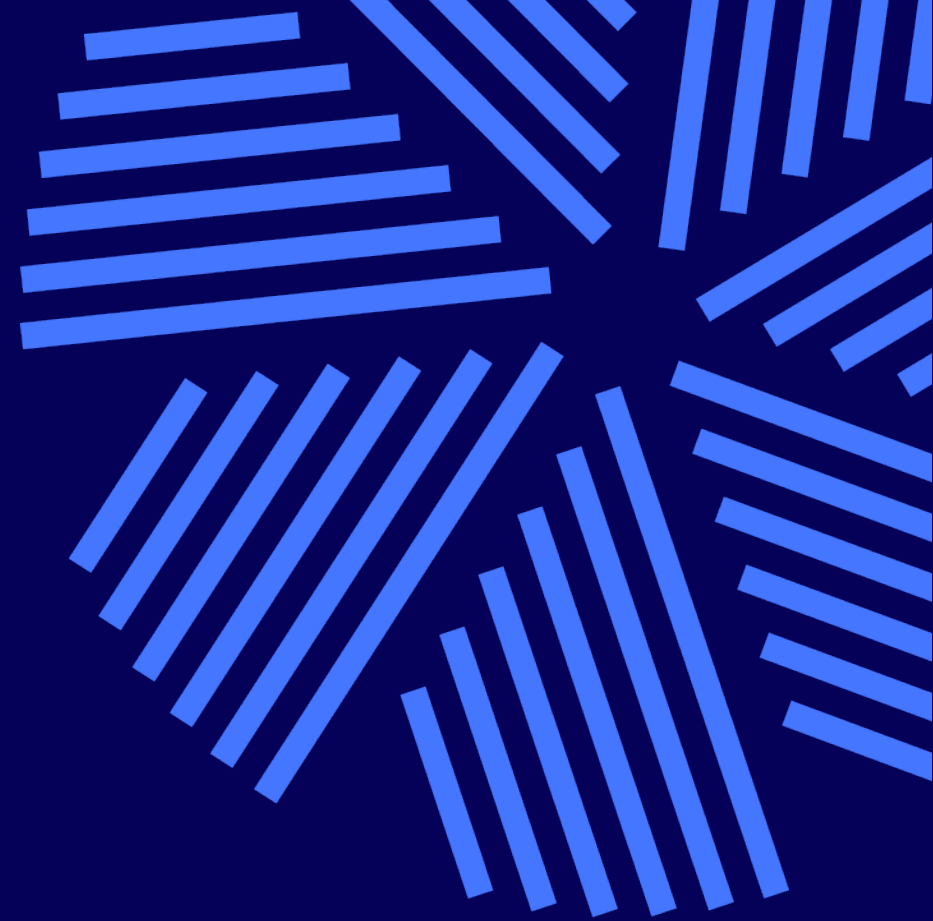
## 2024 Fiscal Year Financials (estimated as of 6/24)

- Estimated FYE Cash Balance: \$165k, down \$27k from FYE2023
- Cash Inflows:\$136k, up 25% from FY2023
  - CFAI Operational Funding: \$33k, down 4%
  - Event Sponsorship & Tickets: \$52k, up 50%
  - CFASN Member Dues: \$37k, up 32%
- Expenses: \$165k, up 32% YoY
  - Programming & Events: \$100k, up 6%
  - Staffing: \$54k, up 120%
- All legal, regulatory, and tax filings current and up-to-date

# NEW BUSINESS

---

Ann Taylor Knotts, CFA, CFP



# THANK YOU FOR YOUR SERVICE

---



**Mark Griffin, CFA**  
Director, Governance Chair



**Taylor Hollis, CFP, CFA**  
Director, M&CS, Research  
Challenge



**David Windley, CFA**  
Ex Officio

# ELECTION: BOARD

---

## **One Year Term: July 2024 – June 2025**

Austin Branstetter, CFA  
Johnny Garrison III, CFA

## **Two Year Term: July 2024 – June 2026**

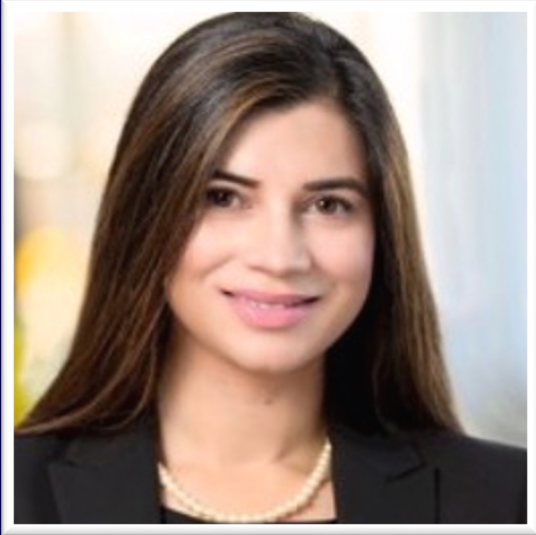
Sam Carden, CFA, CAIA  
Ben Flox, CFA  
David Harkins, CFA, ABV  
Beth Johnson, CFA  
Ann Taylor Knotts, CFA, CFP

## **Three Year Term: July 2024 – June 2027**

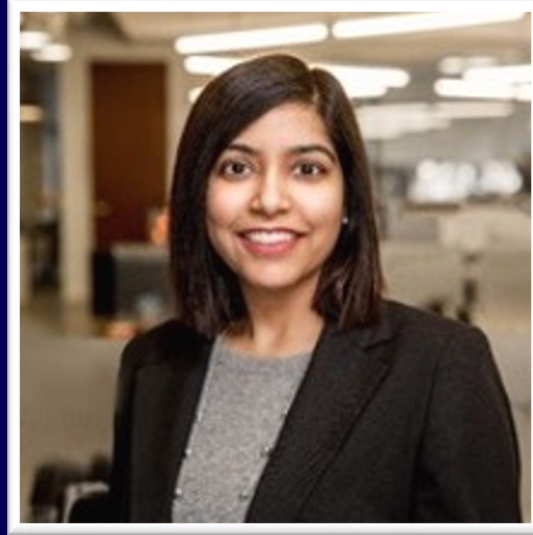
Sahar Ahmad, MBA, CFA  
Russ Barnard, CFA, CFP  
Grace Bennett, CFA  
Bhavna Khurana, CFA  
Scott Krauthamer, CFA, CAIA

# NEW DIRECTORS

---



**Sahar Ahmad, MBA**  
Managing Director  
GE HealthCare



**Bhavna Khurana, CFA**  
Senior Portfolio Manager  
InterOcean Capital at The  
Colony Group



**Scott Krauthamer, CFA, CAIA**  
COO  
Global Business Development Organization  
AllianceBernstein

# ELECTION: OFFICERS

---

**Two Year Term: July 2024 – June 2026**

President:	Austin Branstetter, CFA
Vice President:	Grace Bennett, CFA
Treasurer:	Sam Carden, CFA, CAIA
Secretary:	Michell Bosch, CTP, CFA

# THANK YOU!

---

Questions or Feedback

[info@cfanashville.org](mailto:info@cfanashville.org)

