



CFA Society Columbus

Society Newsletter

Q3 2024

Society Events



Don't forget to follow us on LinkedIn and check your email inbox for the most up-to-date info on our events!

Upcoming events include:

- Wednesday, October 30th, at 1 PM on Zoom. A fireside chat with the author of Your Best Financial Life, Anne Lester. This event is in partnership with the FPA of Central Ohio.
- Thursday, November 7. A distillery tour and tasting at Echo Spirits Distilling. LIMITED SPACE, so sign up fast once we open registration!
- Thursday, November 14. New Charter Dinner. 5:15 at the Westin Columbus.
- Thursday, November 21. A virtual event with Goldman Sachs Asset Management on direct investing.
- Thursday, December 5. A virtual event with EMQQ Global on the future of emerging markets and the rise of a digital India.
- Mid-December. An in-person event with Victor Park Capital Advisors on private credit.

Have suggestions for future speakers? Email Jerry Brown (brownjgb@hotmail.com) or Peter Klingelhofer (petekling@me.com)



Mentorship Program

The CFA Society of Columbus mentorship program is officially live! Our mentorship is a great way to give back to the program and foster the next generation of investment talent.

As a mentor, your role is to share your experience and cultivate coaching, communication and leadership skills.

As a mentee, you gain access to seasoned professionals who can provide new perspectives on a wide range of aspects of the industry.

Register to be a mentor or mentee [here](#).

2025 Sponsorship

Are you or your company looking for a way to contribute to our great programming? Would you like to foster brand awareness among a vibrant ecosystem of CFA charterholders? Do you want to demonstrate your shared commitment to the CFA Institute's mission of advancing ethics, market integrity, and professional standards of practice, which collectively contribute value to society? Or are you looking to generate interest among your employees in society events and becoming a charter holder?

Consider becoming a sponsor for our CFA society. We offer multiple levels of sponsorship with varying benefits, including passes to our events for your employees, prominent display of your company name/logo at events and in communications, and the opportunity to share thought leadership with society charterholders.

Learn more about sponsorship opportunities [here](#) and contact Chi Nguyen at cfacolumbus.info@gmail.com if you have any questions.



CFA Columbus Golf Outing 2024 - Heritage Golf Club

Meet your Board members!



Janice Guo, CFA, CPA is currently a Vice President at Footprint Capital, a boutique investment bank in Columbus Ohio helping privately owned businesses through buy-side and sell-side M&A transactions. In addition to being a charter holder, Janice is also a CPA. Prior to joining Footprint in 2021, Janice spent a couple of years in credit underwriting with First Merchants Bank, four years as an auditor at GBQ Partners and subsequently joined IGS to manage its financial reporting team. Janice is originally from Wuhan, China and moved to Columbus for The Ohio State University (proud Buckeye!). Janice will be assisting on the 2025 CFA Research Challenge local competition.

Fan fact about Janice? "I am a big animal lover and have three fur babies (2 sassy pups, and 1 loving kitty) at home. In my free time,

I really enjoy trying out all kinds of delicious food and working out. I used to never really worked out growing up in China, but now I do Crossfit and just ran my first (and maybe last) Marathon, as I realized exercising means more food!"



Nick Smith, CFA, CPA is a Senior Investment Professional within Nationwide Investment's Private Debt group. He joined Nationwide in 2017 and is involved in the analyzing, underwriting, and execution of below investment grade, illiquid middle market credit investments. Prior to joining Nationwide, Nick spent 3 years working in the Asset Management Assurance practice of PwC. Nick received his bachelor's degree from Wabash College, his master's degree from Indiana University's Kelley School of Business, and holds the Chartered Financial Analyst designation and is a Certified Public Accountant. Nick will be working with Aron as the Assistant Treasurer for the Columbus Society this year.

Fun fact about Nick? "I am an avid golfer and tennis player and lifelong Indiana Hoosier's fan."



Jerry Brown, CFA, has over twenty years of experience in the financial services industry, broken down into three major themes: Credit and capital risk modeling and forecasting, fixed-income credit and investment performance analysis, and client-facing institutional investment advising and analytics. Jerry has a Masters in Chemical Engineering from the University of Maryland and an MBA from "that school" up North. Jerry volunteers at his church as a Small Group Bible Study leader and in his stepson's Boy Scout Troop, and he trained for the Ironman 70.3 Triathlon in July. Jerry is the president of the Toastmasters Club in Westerville, and the Board Treasurer for The Hardy Center, which provides tutoring and mentoring for K-8 students in the Linden area of Columbus. Jerry is married to Kendra Brown and is proud father of four boys, two of whom are adults. Jerry is the 2024-2025 co-programming chair.

Fun fact about Jerry? "On the side, I am an Uber driver. I have met such interesting and varied people along this journey. Let me know and I can share some stories with you. I believe it is important to help people avoid driving when they shouldn't, especially when they have had too much to drink. I just hope they don't get sick inside my car!"

Featured thought leadership from our sponsor:

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Coal: A Vital Resource in a Changing World

Krishna Mohanraj, CFA, and Micah Martin, CFA

Discover why coal remains a critical resource in our changing world. Despite the transition to cleaner energy, coal's consistent demand and constrained supply present a compelling investment opportunity

<https://www.diamond-hill.com/insights/a-707/articles/coal-a-vital-resource-in-a-changing-world/>

Brewing Confidence: Evaluating Starbucks' New Leadership and Market Potential

Rick Snowdon, CFA

Portfolio manager Rick Snowdon shares his insights on Starbucks' potential in the face of operational challenges and a new CEO.

<https://www.diamond-hill.com/insights/a-710/videos/brewing-confidence-evaluating-starbucks-new-leadership-and-market-potential/>

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