



NEWSLETTER

Published Quarterly for Investment Professionals



18th Annual Alternative Investments Panel



Clockwise: Garth Friesen of III Capital Management, Tisha Turner, CFA Society South Florida President, William Kelly, CEO of CAIA Association, and Kristina Hooper, Chief Marketing Strategist of Invesco

CFA Society South Florida's 18th annual Alternative Investments Panel, hosted in collaboration with Chartered Alternative Investment Analyst Association, was nothing short of a success. This timely and engaging presentation focused on the 2020 election and how markets and policy are expected to respond.

» [Watch Replay](#)

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PRESIDENT'S ADDRESS TO MEMBERS

REGISTER TODAY! THE YEAR AHEAD WITH ED YARDENI, JAN 21

MEET YOUR NEW BOARD MEMBERS

WATCH REPLAY: CAREER DEVELOPMENT PANEL



Career Development Panel: Ignite Your Job Search

On September 16 of last year, we hosted an insightful and much-needed discussion on how members could improve their career strategies - especially in this new climate. Special thanks go to longtime CFA Society South Florida Board Member, Stephen Hansen for organizing this event and recruiting Robert Hellmann of Hellmann Career Consulting, Liang Zhong, CFA, CPA, CGMA of NextEra Energy Resources Jessica Dotto representing Robert Half, Rob Isbitts of Sungarden Investment Management, and Melissa Masterson-Kellenberger, CFA of Castle Wealth Management. Please continue to look out for more career development events taking place in 2021!

» [Watch Replay](#)

Register Today: Financial Forecast 2021

As we all know, 2020 has been a head-spinning year. Will the economic and financial outlook be just as crazy in 2021, or can we look forward to less turbulent times next year and beyond?

Join us for Forecast 2021 with CFA Societies South Florida, Tampa Bay, Naples, and Jacksonville on Thursday, January 21 at 5:30 PM as Dr. Ed Yardeni provides a look into the Roaring 2020s, offering a balanced view of the opportunities and risks that are likely to lie ahead. While there are certainly ongoing concerns about the health pandemic, political partisanship, and other challenges weighing on our economy, tune in for why he believes the remainder of the current decade might turn out to be the Roaring 2020s.



» [Register Here](#)

CHECK IT OUT

The ASFIP Foundation, an outreach of Atlanta Society of Finance and Investment Professionals, and CFA Society Atlanta have produced the Spanish version of their original Financial Literacy videos. Press play to check them out and share!

» [Press Play](#)

PRESIDENT'S ADDRESS

Special update from your CFA Society of South Florida President & Programs Co-Chair Tisha Turner, CFA, CAIA, FRM

“

I am honored to fulfill my second and final year as your Society President for 2020-2021.

Dear Society Members and Candidates:

While the Coronavirus (COVID-19) pandemic is changing the way we all live and work, we at CFA Society South Florida are committed to serve you.

I am honored to fulfill my second and final year as your Society President for 2020-2021. I feel even more fortunate to have the pleasure of working alongside three South Florida Past Presidents in volunteer and executive roles. I'd like to take this opportunity to thank the Board and society volunteers for donating life's most valuable asset – their time – in support of our mission to lead the investment profession locally by promoting the highest standards of ethics, education, and professional excellence.

The Board would like to acknowledge the contributions of Directors Wesley Burns, CFA, CFP and Philip J. Keating, CFA who completed their term and stepped down from the board as of June 30, 2020. Wesley served as Education Chair after several years of volunteering for the society. During his tenure he successfully spearheaded the February 2020 Florida Societies Research Challenge, coordinating the logistics for...



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SCHOLARSHIPS AVAILABLE

SPONSORED BY



In partnership with Kaplan Schweser, CFA Society of South Florida will be selecting four candidates to receive a Schweser scholarship for one study package.

Candidates that are interested in more than one study package will be required to pay the difference. For more information, please send an email to admin@cfasouthflorida.org.

» [Apply Here](#)



CAREER CENTER

Did you know? Job listings on CFA Society South Florida are free with a potential reach of over 400 professionals. Send your career opportunity to placements@cfasouthflorida.org.

» [Job Listings](#)



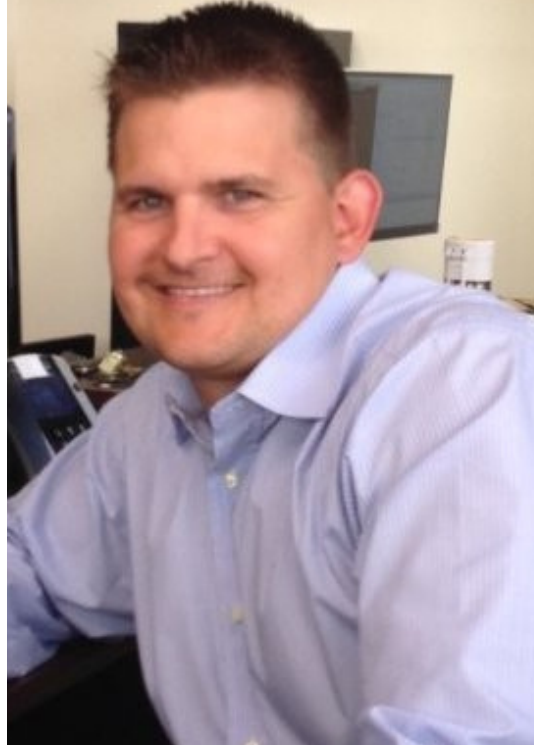
Featured Position

Senior Financial Planner at Castle Wealth Management in West Palm Beach
\$75K - \$85K Annual Salary

[Check It Out Here](#)



NEW



Welcome

2020 - 2021 CFA SOCIETY OF SOUTH FLORIDA BOARD OF DIRECTORS

CFA Society South Florida is pleased to welcome three new members to its Board of Directors. Pictured above from left to right: Melissa Masterson-Kellenberger, CFA, Erik Benson, CFA, and Christopher Fetes, CFA.

Melissa Masterson-Kellenberger, CFA is a portfolio manager with Castle Wealth Management as well as an active member of CFA Society of South Florida. Prior to relocating to the Palm Beaches, Melissa provided advisory consultation services in Charlotte where she held the position of Outlook Chair with CFA Society of North Carolina (2018-2019).

Erik Benson, CFA started his career on the banking side with Turnberry Bank. In 2007, Erik joined Bonds.com to develop the Bondstation fixed-income trading platform. Mr. Benson's primary role included trade execution for all fixed income asset classes along with assisting clients with reverse inquiries.

Erik joined AK Capital in 2010 to launch the corporate, municipal, and agency, trading group.

In addition to managing the trading desk, Erik is also involved in the agency mortgage-backed derivatives trading with the firm's mortgage trading desk.

Christopher joined PNC Private Wealth Management as a Senior Investment Advisor in 2019. Christopher has an extensive background in the investment management industry. He most recently was the Managing Principal & Portfolio Manager at Bolderwood Capital Management, where he ran a long-short credit strategy that focused on non-investment grade credit instruments. Prior to founding Bolderwood, he was an Executive Director at JP Morgan Asset Management, where he spent twelve years as a high yield portfolio manager and analyst. Before joining JP Morgan, he was a Vice President in Global Fixed Income Research at Goldman Sachs & Co.



[Learn More](#)

Looking for a way to give back?

We have a variety of opportunities where you can devote your talent and time. As a member-driven organization, we rely heavily on volunteers to organize events, facilitate services, support the local investment community and make a difference in the world of finance.

IMMEDIATE NEED

Graders for 2021 Florida Research Challenge. Subject company is Chewy.com. Volunteers will be needed for the first 1-2 weeks in February.

» [Apply to Volunteer](#)



From left to right: Tyler Krus, Eli Giombi, Peter Fox, Matt Doll, Corey Tiller, Jim Murphy, Daniel Santiago, and Christian Nana at CFA Holiday Social at Spruzzo in West Palm Beach | December 2, 2020

Thank you for joining us!

We are so glad that CFA members, volunteers, and other investment professionals were able to join us in Boca Raton, Fort Lauderdale, Palm Beach Gardens, and West Palm Beach to celebrate the holidays with great company and cocktails.

Be sure to stay connected to us on social media for news on when and where our Spring Socials will be taking place.

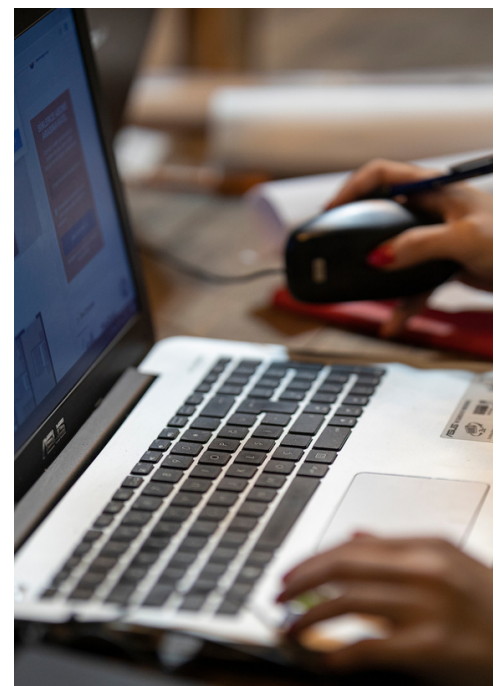
Learn In-Demand Tech Skills

Current CFA South Florida members can now take advantage of online Cognitir courses at 20% off.

Cognitir offers courses specifically designed for finance & business individuals. Their self-paced online learning platform provides a flexible way for professionals to learn in-demand tech skills so that they can improve efficiency on tasks and make data-driven decisions at work.

To receive 20% off all Cognitir's online courses, please visit your Member Portal for the discount code.

» [Learn More](#)



We want to hear from you!

We'd like to feature how amazing CFA South Florida members are on our social media platforms. If you've recently been promoted, changed jobs, appointed to a board, or any other accomplishment, we'd like to share it with our audience of over 1,800. To submit, please send details to admin@cfasouthflorida.org with a high-resolution color photo.

Become a sponsor

Partner with the premier organization for over 400 investment professionals in South Florida by becoming an annual sponsor. In addition to recognition at events, sponsors may receive firm and logo placement on the CFA South Florida website, social media channels, and quarterly newsletter. For more information on becoming a sponsor, please send an email to admin@cfasouthflorida.org.

Stay connected with CFA South Florida



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