

2022 NEWSLETTER

JANUARY – JUNE



**CFA Society
Istanbul**
LET'S MEASURE UP™

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REVIEW OF THE PAST SIX MONTHS

In the first half of the year, we focused on sustainability, ESG and TV appearances alongside with our regular professional learning seminars, panels, employer- regulator- university outreach visits and the CFA Institute Research Challenge. We shared 22 job opportunities with our members to support them in finding new opportunities. 1 more university, Galatasaray University, became CFA Program affiliated, there are now 14 affiliated universities in Turkey.

To have a better grasp of the certifications related with sustainability, we organized ESG Certifications panel with different certificate holders; moreover, we teamed up with CFA Institute, enjoyed an ESG game with our members and got informed about the CFA Institute Certificate in ESG Investing. We believe that understanding how the industry reacts and applies ESG parameters is very important; therefore, we organized a very detailed seminar on Sustainable Finance and ESG Management at Garanti BBVA, with a PL Credit.

We had more chance to meet with employers, regulators and universities in-person. We had 3 university, 12 employer and 3 regulatory outreach visits. In our visits, we communicated CFA Institute's and our mission, gave detailed information about the CFA Program, Certificate in ESG Investing, CFA Society Istanbul activities and the CFA Institute Research Challenge. To reach more people, we were broadcast live on BloombergHT TV twice.

Professional learning is valuable for us, we organized 2 workshops on Hedge Accounting & Inflation Accounting and provided PL Credits. We had our annual Women in Finance panel and supported a women-entrepreneur company by giving gifts from them to the attendees by an online draw.

We are an innovative society. We organized a Strategy Meeting with a diverse group of our members and brainstormed for a full day to plan for our society's next 3 years. Attendees were divided into 4 main groups of Finance Professionals, Universities and Non-Governmental Organizations, Employers of CFA Charterholders and Regulators, 8 in total.

In terms of the CFA Research Challenge, we had 2 local winners: İstanbul Bilgi University and Koç University. Winner teams also attended the Societies Research Challenge in Dubai; and, İstanbul Bilgi University won the challenge.

We had 5 board meetings since the beginning of the year and our annual general assembly will be held in mid-June 2022.

2021-2022 LEADERSHIP

PRESIDENT

Nuri Oğuz Ayhan, CFA

VICE PRESIDENT

Alper Alkan, CFA

SECRETARY

Elif Altuğ, CFA

TREASURER

M. Sinan Veziroğlu

BOARD OF DIRECTORS

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Alper Alkan, CFA

Elif Altuğ, CFA

Albert Krespin

Onursal Yazar, CFA

Püren Kolabaş, CFA

M. Sinan Veziroğlu

Sercan Uzun, CFA

Mustafa Küçükmeral, CFA

DEPUTY BOARD MEMBERS

Aslı Kondu

Alper Özhan, CFA

Ece Mandacı, CFA

Farshad Mirzazadeh, CFA

Mahmut Can Asker, CFA

AUDIT MEMBERS

Evren Ergün, CFA

Mehmet Gerz

Semahat Menevşe

DEPUTY AUDIT MEMBERS

Sinan Sencer Karabulut

İsmail Erdem, CFA

Aytaç Aydoğan, CFA

EXECUTIVE DIRECTOR

İlke Takimoğlu Homriş, CFA
ilkehomris@cfaturkishsociety.org

STAFF

Serra Akçay
serra@cfaturkishsociety.org

COMMITTEES

Membership & Volunteering Committee Lead: Püren Kolabaş, CFA

This committee approves membership applications along with the Board, ensures that member data is used for appropriate purposes only, reviews all policy issues relating to membership, communicates with members and makes surveys to determine their needs. This committee also assists the Program Committee for activities planned for members.

Awareness Committee Lead: Alper Alkan, CFA

This committee oversees public communications including advertising, media communications, outreach etc., develops and maintains listing of local media contacts, develops and maintains website entries, issues press releases, feeds, maintains and develops social media sites (LinkedIn, etc.).

Governance, Advocacy, Disciplinary Committee Lead: Onursal Yazar, CFA

This committee co-ordinates local advocacy efforts, liaises with CFA Institute, advocates for integrity in the local markets through research, guidance, and publication, works with, and provides a resource for, the Disciplinary Committee where appropriate, organizes and maintain AGMs of the Society, Monitors and evaluates progress of the Strategic Plan, determines Action Plans and maintains Action Plans of the 2-year-term for Directors and Officers.

Employer Outreach & Career Committee Lead: İlke Takimoğlu Homriş, CFA

This committee develops programs and services to enhance members' professional skills, provides tools and resources for members looking for jobs in the financial community, organizes career development events and reviews all policy issues relating to career support.

Program and Sponsorship Committee Lead: Sercan Uzun, CFA

This committee counsels both current and prospective candidates about CFA Program or any other product/program by CFA Institute, assists Member Value Committee with Charter Award Ceremony, Markets to the local financial industry the CFA Program any other product/program by CFA Institute, organizes regular events include: charter award ceremony and the Annual General Meeting (AGM).

University Relation Committee Lead: Elif Altuğ, CFA

This committee develops effective interaction with local Universities, develops

and maintains the CFA curriculum inclusion into the Bachelor and Master Program in Finance, facilitates networking opportunities between Society members, CFA program candidates, students from local universities and professionals, encourages university participation in the Global Research Investment Challenge.

IRC Committee Lead: Sinan Veziroğlu, Sercan Uzun, CFA

This committee encourages and organizes university participation among the natural territory of the society (Turkey, Azerbaijan, Georgia) in the Research Challenge, get sponsorship, determines the subject company, follow local, regional and global Challenge timeline, submits registration forms, assigns judges and graders, prepares and edits all the communication including social media posts, press articles, newsletter articles, congratulations messages, feedback reports, gifts, virtual or in-person venue.

Education & Scholarships Committee Lead: Evren Ergün, CFA, Mahmut Can Asker, CFA

This committee counsels both current and prospective candidates about CFA Program Review Courses, organizes CFA exam prep review courses, administers practice exam providers, including maintain contact with mock exam providers, administers the Society's Scholarship Program, administers CFA Institute Society Scholarships.

Technology Committee Lead: Albert Krespin

This committee maintains society website and other IT solutions in coordination with committee heads, evaluates technical solutions, manages Society Domain Name and Web Hosting Relationship, website & publishing also outsourced by the social media agent.

ESG Committee Lead: Oğuz Ayhan, CFA

This committee provides all ESG related trends, research, documents and news, organizes and promotes webinars and trainings, communicates CFA Institute's research reports, consultation papers, surveys, articles, events and webinars to the members, regulatory and governance institutions and companies, attend ESG related events and provides speakers.

EXAM ROAD MAP



CFA® EXAM QUICK START GUIDE

LEVEL ONE

SET THE PACE

ALL ABOUT RECALL



The Learning Ecosystem included with your registration provides the entire Level I curriculum. Exam questions are based on the Learning Outcome Statements at the beginning of each reading. Recall of key terms, formulas, and concepts is crucial.

LEARN TO PACE YOURSELF



Practice questions and mock exams are an important part of your study time. The Learning Ecosystem allows you to time yourself as you take practice tests so the pace of the exam becomes second nature.

TIMING IS EVERYTHING



The Level I curriculum covers a lot of material. The Learning Ecosystem can take you sequentially through the entire curriculum or you can evaluate your current knowledge and customize a study plan to help make the most of your time.

GET TO KNOW YOUR STUDY STYLE



Do not rush through ethics on the assumption that it will all be intuitive to you.

DON'T IGNORE ETHICS



Do you like to hit the books alone or work with a study partner? Do you like to work online or on paper that you can mark up? If you are not sure, experiment until you find what works best for you.

1
LEARNING ECOSYSTEM

10
TOPICS COVERED

57
READINGS INCLUDED

400+
GLOBAL EXAM LOCATIONS

180
MULTIPLE CHOICE QUESTIONS

4
EXAMS OFFERED YEARLY

CFA® EXAM QUICK START GUIDE

LEVEL II

PREP FOR MASTERY

START WITH A QUICK REVIEW



Go back and look at your strengths and weaknesses from the last exam. Make sure you feel comfortable with the fundamentals. Give yourself a little extra study time if you think you need to brush up on the basics.

GET TO KNOW THE LINGO



BE PREPARED TO APPLY THIS KNOWLEDGE MORE DEEPLY



This exam asks you to analyze situations and provides calculations based on the knowledge you have accumulated. Use the practice quizzes and mock exams available in the Learning Ecosystem to gauge your exam readiness.

Practice helps with this goal. The more you read, the more comfortable you will become with the format of the vignettes. Use the Learning Ecosystem features to highlight patterns you notice in key words and phrases.

BECOME EFFICIENT WITH VIGNETTES



Vignettes can be lengthy, so give yourself plenty of time to read. Plan on about 10-20 minutes to read and answer each vignette; the time will vary based on the number of questions that follow the vignette.

PACE YOURSELF



These mini case studies have you work through real-world problems and answer questions related to each of them. Take a quick look at the questions before you read each vignette. This will give you an idea of the subject matter to be covered.

1
LEARNING ECOSYSTEM

10
TOPICS COVERED

48
READINGS INCLUDED

400+
GLOBAL EXAM LOCATIONS

20-30
VIGNETTES

2
EXAMS OFFERED YEARLY

CFA® EXAM QUICK START GUIDE

LEVEL III ALL ABOUT THE ESSAY

IT ALL COMES TOGETHER

In the past two exams, you were asked to describe and analyze. In this exam, you will need to justify your thinking by synthesizing information and applying solutions. Portfolio management and wealth planning will be heavily featured.

BE MINDFUL OF TIME

Plan how much time you can give each answer and stick with it. If you are stumped by a question, move on to one you are more comfortable with and complete that one. You can go back to your skipped question later if you have time.

UNDERSTAND THE FORMAT OF ESSAY QUESTIONS

There are two types—constructed responses (word-based) and calculation-based responses. Get started right away framing your study around these formats. Use the practice quizzes and mock exams available in the Learning Ecosystem to gauge your exam readiness.

You do not get extra credit for producing a lot of words. Meandering prose can potentially hurt your score. Answer succinctly and to the point. Use bullet points if you would like to.

PROVIDE EXACTLY WHAT IS ASKED FOR (AND NO MORE)

SHOW YOUR CALCULATION METHODS

For calculation-based questions, show how you arrived at the answer. Even if you make a simple math error, you may get points for successfully completing part of the calculation.

1
LEARNING ECOSYSTEM

400+

EXAM LOCATIONS

6
TOPICS COVERED

10-15

ITEM SET QUESTIONS

38
READINGS INCLUDED

2

EXAMS OFFERED YEARLY

CFA CHARTER

Achieve the highest distinction in the investment management profession—the CFA designation.

THE CHARTERED FINANCIAL ANALYST (CFA®)

Program helps you capitalize on your strengths, supercharging your education and work experience into a designation that will tell the world you have the skills necessary to compete and excel in today's complex and evolving investment industry. The CFA charter is the gold standard for the investment industry. Charterholders enjoy a mark of distinction throughout the world.

CFA Program provides the strongest foundation in advanced investment, analysis, and real-world portfolio management skills for a career advantage that you will use at all stages of your career. This globally recognized and respected credential is held by over 167,000 professionals across 165 countries.

"You can hire people with an MBA, but you don't necessarily know that one MBA is the same as another MBA, whereas if you hire investment professionals with a CFA [designation], you absolutely have confidence at the level of qualification."

—Jenny Johnson, Franklin Templeton COO/President

THE VALUE OF THE CHARTER

- ✓ **POWERFUL GLOBAL NETWORK** of top industry professionals
- ✓ **STRONG FOUNDATION AND COMMITMENT** to ethics and professionalism
- ✓ **REAL-WORLD SKILLS** for making complex investment decisions
- ✓ **RECOGNIZED AND WELCOMED** by markets and employers globally
- ✓ **UNMATCHED EXPERTISE** in both practical investment analysis and management skills
- ✓ **ACCESS** to career-advancing tools and education

TOP FIVE GLOBAL CHARTERHOLDER ROLES

JOB TITLES

- 1) Portfolio Manager
- 2) Research Analyst
- 3) Chief Level Executive
- 4) Consultant
- 5) Risk Manager

PRACTICE TYPES

- 1) Equities
- 2) Fixed Income
- 3) Private Equity
- 4) Derivatives
- 5) Real Estate

HOW TO EARN THE CFA CHARTER

THE PATH TO BECOMING A CHARTERHOLDER

- ✓ **Pass Three Levels of the CFA Exam**
- ✓ **Achieve Qualified Work Experience**
- ✓ **Submit Reference Letters**
- ✓ **Apply for CFA Institute Charterholder Membership**

EXAM SUCCESS INCLUDES

300+ HOURS	On average, candidates spend 300+ hours of study per exam level.
EXAM PREP	All exam questions are based on CFA Program curriculum.
STUDY TOOLS	Online Learning Ecosystem, Practice Questions, Mock Exams, Candidate Discussion Board, and Approved Prep Provider List.
4+ YEARS	On average, it takes 4+ years to complete the full program.

ENROLLMENT REQUIREMENTS

To enroll in CFA Program and register for the Level I CFA exam, you must have an international travel passport and meet one of the following entrance requirements:

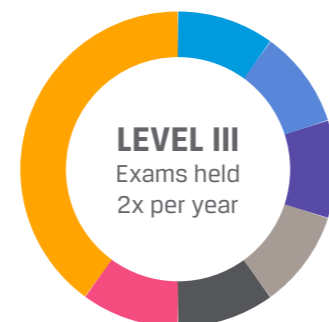
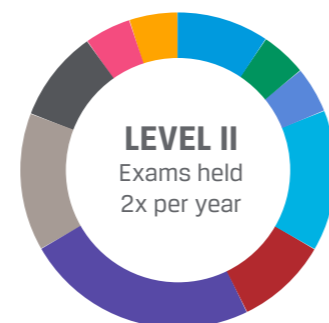
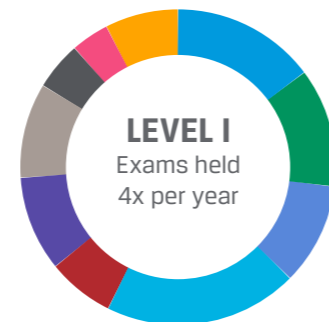
- ✓ **Bachelor's Degree**
Complete a bachelor's program or equivalent program and received a university/college degree. If you're not sure if your program is comparable, ask your college or university.
- ✓ **Final-Year Student**
Be within 11 months of your graduation month for your bachelor's degree or equivalent program on the date of sitting for the Level I exam.
- ✓ **Professional Work Experience**
Have a combination of 4,000 hours of work experience and/or higher education that was acquired over a minimum of three sequential years on the date of enrolling for the Level I exam. Dates of education and professional work experience cannot be overlapping.

READY TO TAKE THE NEXT STEP?

Visit www.cfainstitute.org/programs/cfa for more detailed information.

COMPLETE THREE LEVELS OF THE CFA EXAM

Focus areas vary by exam level, increasing in complexity and difficulty with a core of ethics and professional standards across all levels.



CURRICULUM TOPICS

- ETHICS AND PROFESSIONAL STANDARDS
- QUANTITATIVE METHODS
- ECONOMICS
- FINANCIAL REPORTING AND ANALYSIS
- CORPORATE FINANCE
- EQUITY INVESTMENTS
- FIXED INCOME
- DERIVATIVES
- ALTERNATIVE INVESTMENTS
- PORTFOLIO MANAGEMENT AND WEALTH PLANNING

EXPLORE AVAILABLE SCHOLARSHIPS

CFA Institute's variety of scholarships allow more people to participate in the CFA Program. You can find the full list of scholarships below or take advantage of the scholarship assessment tool to find the scholarship best suited for you. All scholarships include a waived enrollment fee and discounted registration.



ACCESS SCHOLARSHIP

For individuals who may not be able to afford the program fees. Applicants must meet all CFA Program enrollment requirements.

Exam registration reduced to **USD250**.



PROFESSOR SCHOLARSHIP

For full-time college/university professors or administrators / department heads who teach a minimum number of credit hours at qualified institutions and have not yet registered for their next exam.

Exam registration reduced to **USD350**.



WOMEN'S SCHOLARSHIP

For women who are interested in earning the CFA charter, do not qualify for other CFA Institute scholarships, and have not yet registered for their next exam.

Exam registration reduced to **USD350**.



REGULATOR SCHOLARSHIP

For employees of financial regulators, central banks, securities commissions, qualifying stock exchanges, SROs and/or government entities. Specifically, those entities that oversee or regulate operations, standards of practice or business conduct of the investment management industry and which have entered into a program agreement with CFA Institute.

Exam registration reduced to **USD350**.



STUDENT SCHOLARSHIP

For students currently attending an affiliated university and have not yet registered for their next exam.

Exam registration reduced to **USD350**.

ESG INVESTING IS HERE.



Why is the CFA Institute Certificate in ESG Investing Important?

The answer is quite simple. ESG investing is here to stay. And by earning this qualification, financial professionals can stay a step ahead of the growing interest to build portfolios with a purpose.

Those who take the program will gain the valuable skills and insights needed to integrate ESG factors (environmental, social, and governance) into the investment process to help meet the needs of your clients and deliver value to your firm.

"I found the Certificate in ESG Investing helped fill gaps in my knowledge and brought together the subject in an informative and coherent way."
- (Tom U, Head of Discretionary Sales)

"A great exam. I now have a far better understanding of how and why ESG should be incorporated across all investments, rather than simply ethical mandates."
- (Matt K, Investment Manager)

"The benefit of the Certificate in ESG Investing is that it provides the requisite foundation from which investors can critically assess the opportunities and challenges posed by current and emerging practices, methodologies and tools."
- (Cameron F, Senior Manager Research Analyst)

Who is the certificate for:

Analysts, portfolio managers, c-suite executives or anyone with a foundation in investment management interested in mastering ESG Investing

Earning the CFA Institute Certificate in ESG Investing is not just a step in the right direction for the investment industry. It can be extremely beneficial to your career. With a much-respected foundation in ESG skills and knowledge, you can expand your opportunities in the industry by staying

FAQ:

- **Am I eligible for the certificate?** There are no formal entry criteria, but it is recommended that candidates have knowledge and grounding in the investment process. *Please note there is a study commitment of 100 hours on average.*
- **How do I take the exam?** You will have one year from registration to schedule and take your examination. You can take the exam at a Prometric test center, or through remote proctoring if available in your country.
- **What will I learn?** See the latest [syllabus here](#).

Cost:
\$675 USD

Length:
100 Multiple Choice Questions

Exam Duration:
2h 20min

Study Time: ~100 Hours Recommended

on top of the latest demands by investors. You'll have the competency and credibility to provide ESG recommendations to clients to meet the needs of new mindsets and strategies rapidly changing the world of investing.

- **What will I receive once I register?** Registration includes the first exam sitting, a mock exam and access to online learning materials via a secure platform. This information will be provided to you upon confirmation of your registration.

RESOURCES:

Click [here](#) to:

- Check out CFA Institute Views on ESG Investing
- Learn More about the Certificate in ESG Investing
- Register Now

UNIVERSITY OUTREACH

26 MARCH ÜSKÜDAR AMERICAN ACADEMY CAREER DAY

We were at Üsküdar American Academy Career Day to inform high school students about the CFA Program. We met young students who want to pursue a career in finance industry and talked about how the CFA Program and the CFA Institute Research Challenge would benefit them in their pursuit.

19 APRIL İZMİR UNIVERSITY OF ECONOMICS

We had an in-person meeting with İzmir University of Economics . It was a joy for us to meet the students and inform them about CFA Institute, our society, CFA Program, scholarships and the Certificate in ESG Investing.



28 APRIL İSTANBUL KADİR HAS UNIVERSITY

We were with Kadir Has University finance students. We talked about the CFA Program, scholarships, Certificate in ESG Investing, our events and Research Challenge. Kadir Has University is one of the 14 affiliated universities in Turkey.



23 MAY
YILDIZ TECHNICAL UNIVERSITY

It was great to see Yıldız Technical University students in-person. We talked about the CFA Program, CFA Institute Research Challenge, Certificate in ESG Investing. Yıldız Technical University was one of the finalist teams in the Local Research Challenge. Two members of the team spoke on stage about their experience and encouraged other students to participate in the Challenge.



UNIVERSITY AFFILIATION PROGRAM

Academic institutions that embed a significant portion of the CFA Program Candidate Body of Knowledge (CBOK)—including the Code of Ethics and Standards of Professional Conduct—into their curriculum may be eligible to participate in the University Affiliation Program. An Affiliated University signals to their students and to employers that their curriculum is closely tied to the practice of investment management and is helpful to students preparing for the CFA® Program exams.

APPLY TO THE UNIVERSITY AFFILIATION PROGRAM

To request an application* and find out more, please email us at university@cfainstitute.org. *Applications for the University Affiliation Program are considered on a case-by-case basis; meeting eligibility requirements does not guarantee acceptance into the program.

14 CFA PROGRAM AFFILIATED UNIVERSITIES IN TURKEY

Bilgi University, Bilkent University, Boğaziçi University, Dokuz Eylül University, Galatasaray University, Istanbul Commerce University, İstanbul University, Kadir Has University, Koç University, ODTÜ, Piri Reis University, Sabancı University, TED University, Yeditepe University.



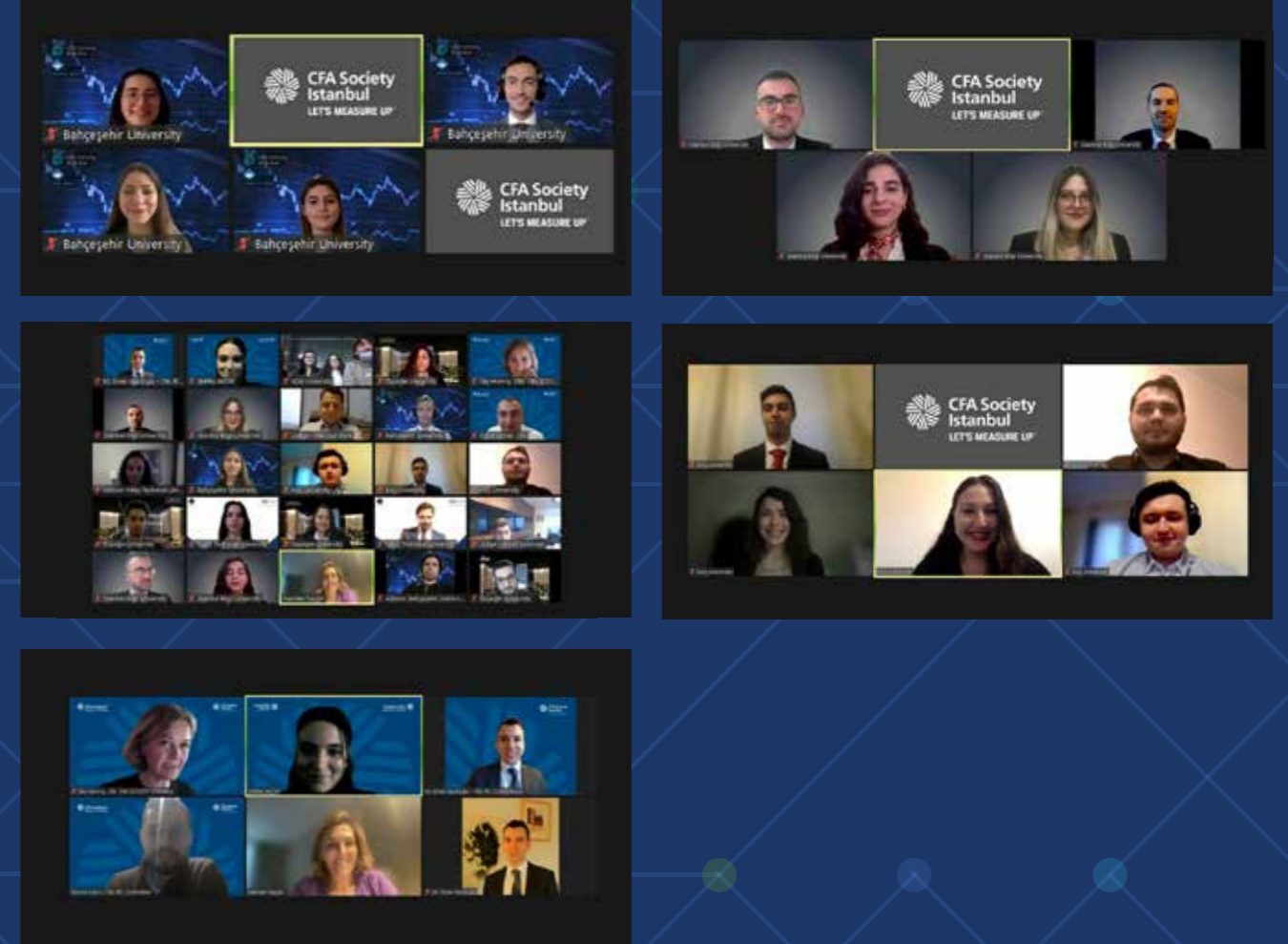
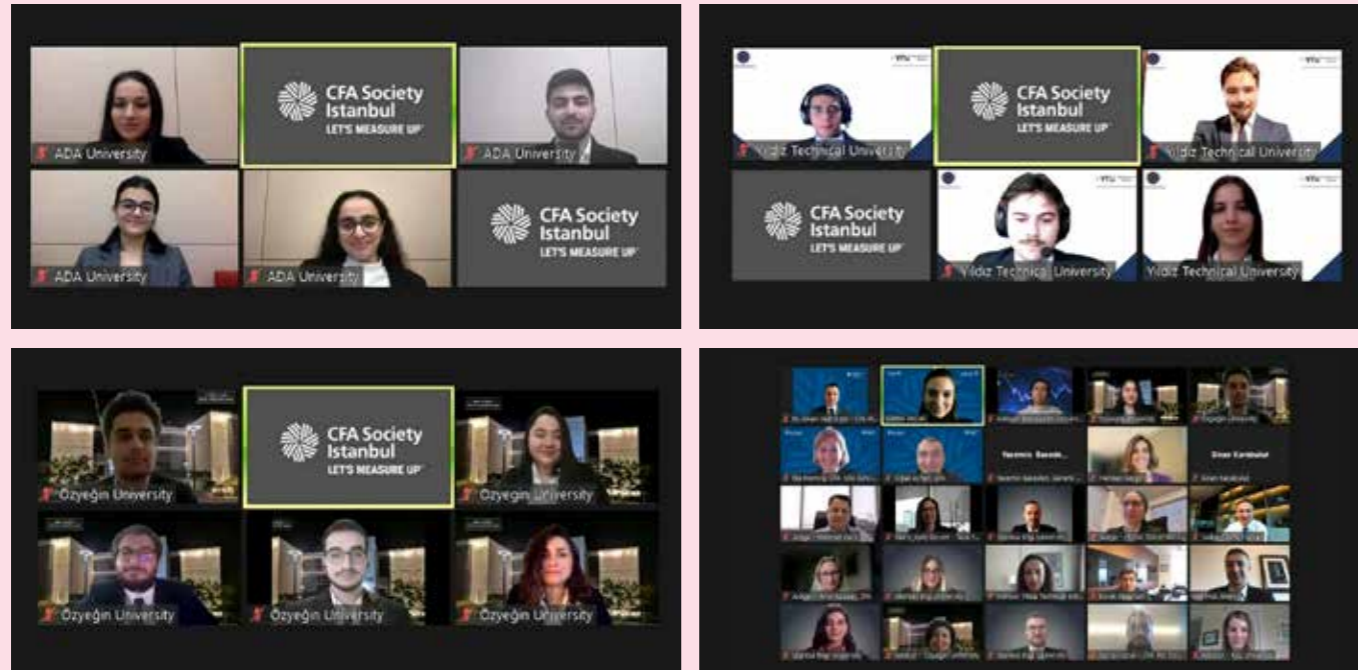
RESEARCH CHALLENGE 2021-2022 LOCAL FINAL

This year we started the CFA Institute Local Research Challenge with online sessions, bootcamp, Kick-Off Meeting, information session for academicians and information session for industry mentors. 22 university, 26 teams participated in the challenge with 2 university, 4 teams from Azerbaijan and 1 university and 2 teams from Georgia.

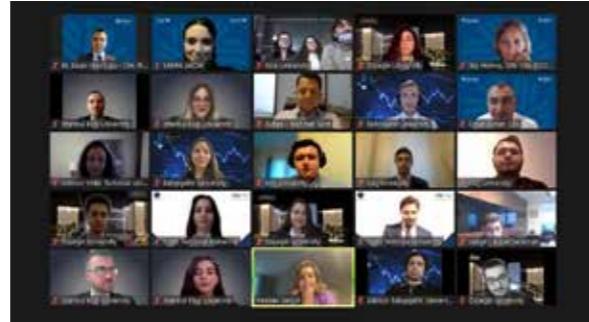
We finalized CFA Institute Research Challenge Virtual Local Final on 25 February with great success! This year, these teams were at the Local Final: ADA University, Bahçeşehir University, İstanbul Bilgi University, Koç University, Özyeğin University and Yıldız Technical University; and, the Local Winners are alphabetically BİLGİ UNIVERSITY and KOÇ UNIVERSITY! İstanbul Bilgi University and Koç University represented Turkey in the Sub-Regional Finals.

We thank the following people and institutions for their support: İş Asset Management and its CEO Burak Sezercan; Garanti BBVA: Mahmut Akten, CFA, Handan Saygın, Yasemin Baseden; our judges: Burak Sezercan, İlknur Kocaer, CFA, Mehmet Gerz, Tefik Eraslan, Yesim Tokat-Acikel, Ph.D.; our Research Challenge Committee Leads: Mehmet Sinan Veziroglu, Sercan Uzun, CFA, CAIA; and our president Nuri Oğuz Ayhan, CFA.

25 FEBRUARY ONLINE, RESEARCH CHALLENGE LOCAL FINAL



THE SOCIETIES RESEARCH CHALLENGE



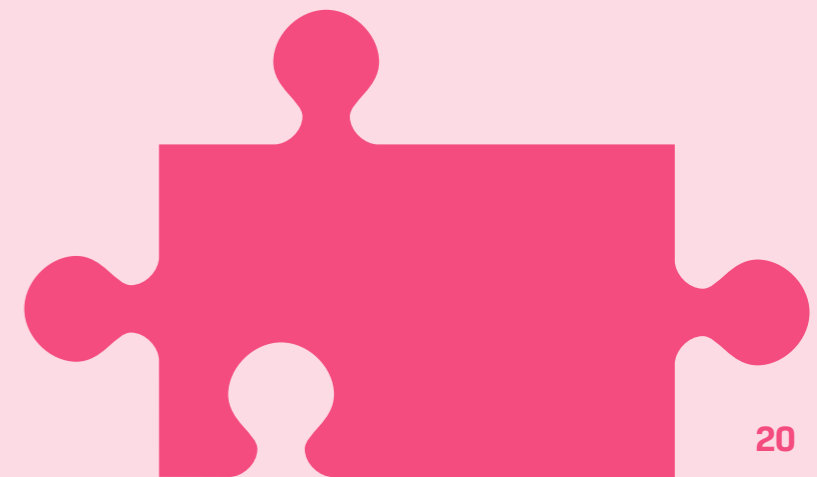
We were in Dubai in March for the Societies Research Challenge which was organized by CFA Society Emirates. We attended with our 2 winning teams, İstanbul Bilgi University and Koç University. A big congratulations to İstanbul Bilgi University, they won the challenge! We are really happy that we could have an in-person event and had the opportunity to collaborate with other societies and students!



8TH WOMEN IN FINANCE PANEL

We had our 8th Women in Finance panel with very inspiring women leaders in finance: Ahu Serter, Fark Labs & Arya, Founder and Ece Börü, TSKB, General Manager. The moderator was CFA Society Istanbul Vice President Alper Alkan, CFA.

As CFA Society Istanbul, we strive to support women entrepreneurs in our events. In this event, Ayse Kefli, UnoMoi, Co-Founder, was with us. UnoMoi is a provider of an online platform for renting designer dresses and accessories intended to revolutionize retail through exclusive subscription service. They gifted 3 attendees, which was decided by an online draw, with a free full promocode, and also gave a 15% promocode to all of the attendees.



CHARTER AWARD CEREMONY

13 MAY 2022

Every year, we celebrate the achievement of the new Charterholders with our members. We had a great Charter Award Ceremony & Networking event this May with the participation of Murat Zaman, Deputy Minister, Ministry of Treasury and Finance. We thank Mr. Zaman, our new Charterholders and all members for joining us on this beautiful event. Find photos [here](#). There is also a video of the day, you can watch [here](#).

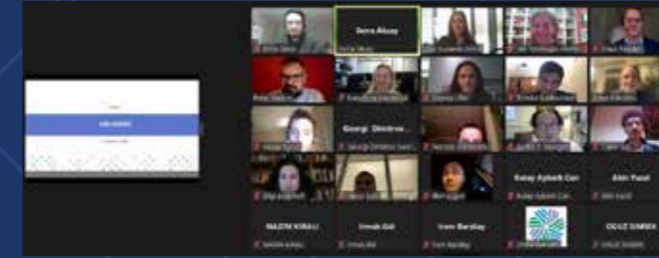


WEBINARS & EVENTS

1 FEBRUARY
ESG INFORMATION SESSION WITH KÜBRA KOLDEMİR & İLKAY DEMİRDAĞ FOR OUR ESG COMMITTEE

3 FEBRUARY
ESG GAME & CERTIFICATE IN ESG INVESTING INFO SESSION

We had an ESG game and Certificate in ESG Investing info session on with our members and the CFA Institute. It was fun and educational. We thank Klaus Paesler, CFA, Julia Susanne Orlich for their support.



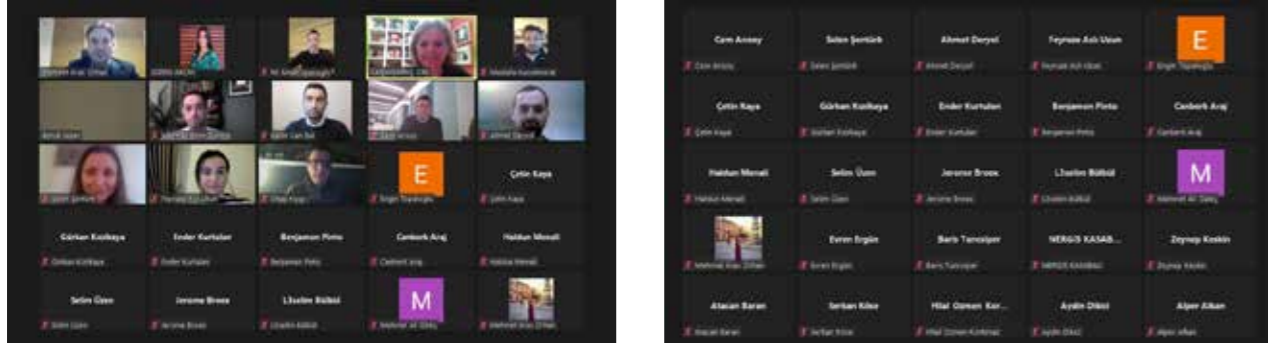
9 FEBRUARY
LIVE SESSION AT BLOOMBERG HT WITH İLKE HOMRİŞ, CFA & OĞUZ AYHAN, CFA

We were live on Bloomberg HT. How we aim to create a better finance industry through the CFA Program, Certificate in ESG Investing and our society events were the main topics that our President Nuri Oğuz Ayhan, CFA and Executive director İlke Takımoğlu Homriş, CFA, talked about. Nick Bartlett, CFA, from the CFA Institute, also joined us with complimentary remarks. You can watch the video at 13:00 [here](#).



1 MARCH
HEDGE ACCOUNTING WORKSHOP WITH ARAS BULUT ORHAN

Based on feedback from our member survey, we organized a "Hedge Accounting" educational workshop on 1 March. We learned a lot and received very good feedback. We provided our members a PL credit for this workshop.



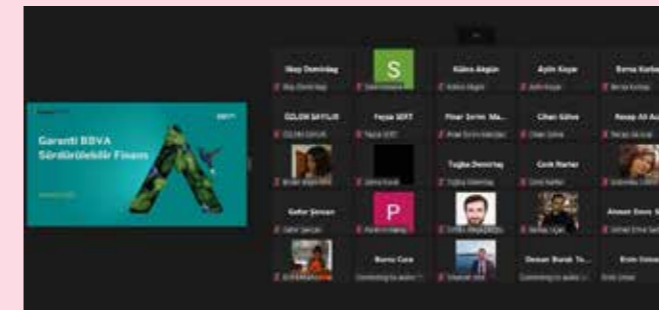
20 MARCH
CFA SOCIETY ISTANBUL STRATEGY MEETING

We met with 50 of our members of diverse profiles to work on our Society's strategy for the next 3 years. It was a full day workshop with hard work and lots of brainstorming. We are grateful to our members for their commitment, despite the heavy snow. We'd also like to thank Ertunc Tumen, CFA for being our moderator throughout the event.



28 APRIL
SUSTAINABLE FINANCE AND ESG MANAGEMENT AT GARANTI BBVA SEMINAR

We were with Garanti BBVA Sustainable Finance Manager Seray Imer for "Sustainable Finance and ESG Management at Garanti BBVA" seminar. We had valuable insight on the subject and its application. We provided our members a PL credit for this seminar. You can watch [here](#).



17 MAY
LIVE SESSION AT BLOOMBERG TV WITH M. SINAN VEZİROĞLU AND SERCAN UZUN, CFA

We were live on Bloomberg HT TV with our Research Challenge Co-Leaders M. Sinan Veziroğlu and Sercan Uzun, CFA. We talked about the CFA Institute Research Challenge, competition process along with its benefits to students and the finance industry. You can watch the video at 16:50 [here](#).



13 JUNE
INFLATION ACCOUNTING WORKSHOP WITH AJDA ERTUĞRUL

Inflation Accounting seminar was very beneficial to all our members. It was one of the most interactive sessions. We provided the CFA Charterholder attendees with a PL Credit.



EMPLOYER OUTREACH



REGULATOR OUTREACH



19 APRIL İZMİR COMMODITY EXCHANGE

We visited İzmir Commodity Exchange on and talked about collaboration opportunities, the CFA program and ESG investing. Dr. Erçin Güdücü, Secretary General, and Mustafa Yağcıoğlu, Deputy Secretary General, for the meeting.



26 MARCH VISIT TO DEPUTY ECONOMY MINISTER MR. ZAMAN

Our visit to the Deputy Economy Minister Mr. Zaman last April ended with a tour of the Turkish State Mint. Definitely a must see venue for everyone, especially for all of us in finance.



CAREER CENTER

We shared and shared with our members 22 job opportunities in the past six months.

Join CFA Society Istanbul's Career Center to find the best employer or employee!

We are working hard to give you the best support by helping you find the right employers and employees. Therefore, we have launched our Career Center where you can create an account. After this process, we will activate your account and you will have access to the resume database. If you wish to have access to the resume database, you will need to purchase or redeem the discount code for one of the following job posting packages: Balanced, Distributed, or Diversified.

Below you can find two detailed road maps for creating a company account to find an employee and creating a job seeker account to find an employer. You can send us an email at career@cfaturkishsociety.org for employer and job seeker manuals.

Please reach us for job postings.

FOR COMPANIES

You can create both internship and job opportunities. If you have internship opportunities, [click here](#) to post them at no cost.

Here are the steps:

Create an Account

1. Access the Career Center at
2. Select the Create an account link.
3. Contact CFA Society Istanbul to confirm your account name once it has been created and activated. We will have your access to the resume database activated.

All job postings are visible to global job seekers. You have the option to add screening questions to your job postings if you like which will filter job applicants based upon their responses. If you

would like to add screening questions to your job then we can help you. You have the opportunity to ask up to 5 yes or no questions. If you are seeking only applicants from Turkey then the question "Do you currently live in Turkey?" or a question you prefer can be added.

Post jobs anonymously: "Regarding posting a job anonymously, an employer can absolutely do that. The employer should note "Confidential" or "Anonymous" in the alternate employer name field during the job posting process.

Search Resumes

Once CFA Society Istanbul has confirmed that your access to search the resume database is activated, you can log in at <https://employers.cfainstitute.org/> with the credentials previously created. If you wish to have access to the resume database, you will need to purchase or redeem the discount code for one of the following job posting packages: Balanced, Distributed, or Diversified.

Search Resumes

- Resume Alerts
- Saved Searches

**If you like we can also create an account for your company; but we should note that we will need further information about your company and job announcement.*

** Please reach us for the code for free job postings. You can use the discount code with any of the job posting packages for unlimited usage.*

Please let us know your decision and do not hesitate to contact us at career@cfaturkishsociety.org!

FOR JOB SEEKERS

Here are the steps:

Log into Account

1. Access the Career Center at <https://careers.cfainstitute.org/>
2. Select the Sign In link.

Manage your Profile

Create your Profile

1. Click the dropdown arrow by your name in the upper right-hand corner and select Your profile. (Note: You can access your profile and make edits to it at any time using this link.)
2. Upload your resume from your computer or from cloud storage. Employers use the Career Center to search for candidates for their open positions. If you would like your profile to be visible select Yes; if not, select No. (Note: You can exclude specific employers by typing the employer name into the field provided. If they have an account, the employer name will autofill.) Click Save when finished.
3. Enter your professional details in the fields provided. (Note: Red dots indicate required fields.)
4. Review and agree to our Terms and Conditions and Privacy Policy by checking the box. Click the Save changes button when done.

Delete Account

1. Click the dropdown arrow next to your name and select the Your profile dropdown option.
2. Select the Delete profile link.
3. Click the Delete button in popup screen that opens.
4. Navigate to the inbox associated with your account. Click the link in the body of the email. (Note: Check your spam or junk mailboxes if you do not see the email in your regular mailbox. The sender is CFA Institute Career Center <info@careers-email.cfainstitute.org>.)
5. You will be directed to a confirmation page.

Search for Jobs

1. Click Find a Job in the top navigation bar. You can also Browse jobs by Job Function in the section on the Home page.

2. The view on the Find a Job page defaults to global jobs. Use the left navigation bar to Browse or Search by a variety of criteria.
3. Click the job title to review the full details of a job posting.
4. On the job posting, you can click the link to send the job to your email, Save the job to your shortlist, or apply for the position. You may be redirected to the company's application portal for some positions. Most of the time, you can apply instantly by entering information in the required fields then clicking the send application button.

Save Jobs to Shortlist

1. Jobs of interest can be saved to a shortlist by clicking the Save link on each job posting. (Note: The star will turn blue when saved.)
2. Access your shortlist by clicking the dropdown arrow next to your name. Select the Your jobs dropdown option.
3. Click Shortlist to view and manage your saved jobs.

Create Job Alerts

Job alerts are daily emails notifying you of jobs that meet specified criteria you select.

1. From the Home page, click the Job Alerts link in the top navigation bar.
2. Enter details for the type of jobs you would like to receive alerts for. More search criteria are available under the More options dropdown. Click the Email me jobs like this button when finished.
3. You will see the details of your alert on the confirmation screen.
4. Job alerts are managed in the Your jobs section of your account. Click the dropdown arrow next to your name then select the Your jobs dropdown option to access.
5. Click Job alerts. Here you can Preview, Edit, Delete, or Create a job alert.

Please do not hesitate to contact us for your questions at career@cfaturkishsociety.org!



THIS IS YOUR OPPORTUNITY TO SEIZE THE FUTURE. RIGHT NOW.

Each conference in the Alpha Summit event series from CFA Institute is designed to deliver knowledge, information, and professional connections to help you think beyond the horizon. We shared 3 complimentary tickets to 3 of our members through an online draw.

ABOUT ALPHA SUMMIT GLOBAL

WHAT

Alpha Summit GLOBAL will prove to be the premier investment conference of the year as thousands of investment professionals will login to hear top executives, experts, and luminaries exchange ideas that can help us all shape the future. The culmination of a three-part event, Alpha Summit GLOBAL will dive even deeper into the issues disrupting the world and our industry today. With the goal of learning how we all can play a role in using finance for good, we will present three-days of indepth discussions and presentations on five key content themes.

WHAT

17-19 May 2022 8:30 am – 1:30 pm ET

WHERE

Virtual Conference

WEBSITE

<https://cfainst.is/GLOBAL22>

#AlphaSummit

Enhancing Investors' Trust

2022 CFA Institute Investor Trust Study



EXECUTIVE SUMMARY

TRUST, IN SOME FORM, IS AT THE CENTER OF ALL FINANCIAL TRANSACTIONS.

Investors must have confidence in the financial system overall, and trust is especially important for investment management, since client outcomes manifest only over a future horizon. Industry leaders must understand the drivers of investor trust so they can deliver the most value.

In the 2022 CFA Institute Investor Trust Study, the fifth in our biennial series, we found that trust levels in financial services among retail and institutional investors have increased significantly since 2020. Institutional investors—such as insurance companies, pension funds, endowments, and others—generally have high trust levels in the firms that manage their assets and are satisfied with the value these firms provide. Retail investors also express high trust levels overall, though trust is lower for them than among institutional investors, and importantly, satisfaction differs between retail investors with an adviser and those without an adviser.



In Section II, we examine the **trust divide** among investor cohorts, including differences across geographic markets, between generations, and between retail investors with and without an adviser.



In Section III, we discuss how **technology can be a trust multiplier** in the provision of investment services. For the first time, we found that most retail investors believe access to the latest technology tools to manage their investments will be more important than access to a human being in the next three years. Half of retail investors and more than four-fifths of institutional investors reported that expanded use of technology has increased trust in their adviser or asset manager.



In Section IV, we look at the **plus factors of values and personal connection** in building and maintaining

trust. Personalization is additive to trust, and advisers can increase their effectiveness if they understand their clients personally and provide investment products that align with clients' personal values and beliefs. Investment products and strategies that incorporate sustainability preferences continue to play an important role in this regard, and direct indexing is an emerging area for growth.

We conclude with a summary of actions for financial advisers and investment firms to take to build trust for the long term. Trust enhancers include such things as new technology and related product innovations and a better alignment of interests between firms and clients that incorporates client values and broader expectations for how their funds are invested. Strong brands can also enhance trust, along with client communications that adapt in high-trust situations, such as the onset of an advisory relationship or in changing market conditions.

TRUST.CFAINSTITUTE.ORG

CONTACT INFORMATION AND SOCIAL MEDIA

General Issues: info@cfaturkishsociety.org

Membership: membership@cfaturkishsociety.org

Events: program@cfaturkishsociety.org

Education: candidateprep@cfaturkishsociety.org

Research Challenge: researchchallenge@cfaturkishsociety.org

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