



**Annual Report
2019-2020**

CFA Society St. Louis Annual Report 2019-2020

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Administrative Office
The CFA Society of St. Louis
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Officers, Board of Directors, and Standing Committees

(Voting members)

<u>Position</u>	<u>Name</u>
President	Nong Lin, Ph.D., CFA
V.P., Program Chair	John Dutemple, CFA
Treasurer	<i>Jeff Grossman, CFA, 7-1-2019 to 12-31-2019</i>
Treasurer	Tim Westrich, CFA, 1-1-2020 to 6-30-2020
Secretary	Tim Westrich, CFA
Immediate Past President	Paul Simmons, CFA
Director 2020	Jack Dwyer, CFA
Director 2020	Cheryl Finn, CFA
Director 2021	Patrick O'Neil, CFA
Director 2021	Chris Bloomstran, CFA
Director 2022	Elizabeth Jourdan, CFA
Director 2022	Matt McTague, CFA

Committees: (Non-voting unless listed as a Director/Officer above)

<u>Committee</u>	<u>Chair</u>
Programs	John Dutemple, CFA
Communications	Steve Kenney
Research Challenge	Brendan Du, CFA/Joe Lachky, CFA (Co-chairs)
Advocacy	Juli Niemann, CFA
Education/University Relations	Kristin Steffens, CFA
Membership	Brian Cox, CFA
Technology/Social Media	Steven Kenny
Sponsorship	Matt McTague, CFA/Joan Hecker
WIM	Elizabeth Jourdan, CFA

President's Report

Submitted by President, Nong Lin, Ph.D., CFA

What a year it has been! The COVID-19 pandemic has thrown a monkey wrench into our plans. When I looked back on the past twelve months, our society still held many great events. We invited CFA Institute's new CEO Margaret Franklin to celebrate with us at our 70th anniversary event; and Charter-award ceremony last year. We hosted a successful Annual Forecasting Dinner event in January with First Trust's Chief Economist Brian Wesbury as the keynote speaker. In February, we hosted the biennial economic outlook luncheon, with keynote speaker Dr. James Bullard, President of the Federal Reserve Bank of St. Louis. We also organized an event in St. Charles County, the first ever member dialogue event on Washington policies, with US Congressman Blaine Luetkemeyer, the U.S. Representative for Missouri's 3rd congressional district.

I want to give my thanks to John Dutemple for his leadership of the Program Committee. We had 32 events, 22 of them are educational events. Over 2000 attendees came to our events again. I would also like to thank our board of directors and all the committees that help make our society function successfully in the past year. Finally, I want to thank Joan Hecker, our executive director of the society. Without her support, many of our society's activities will not happen at all.

In this challenging time, CFA Institute has revisited the strategies on how to fulfill the Institute mission and grow the Institute relevance and influence. The institute's new strategy is to achieve three main goals:

- (1) increase CFA Institute influence across the ecosystem,
- (2) increase CFA Institute global customer base and
- (3) increase scale & diversify CFA Institute product portfolio

All these strategies are for us to fulfil the Institute's mission, "To lead the investment profession globally by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society". I always like the last six ending words of the mission, "for the ultimate benefit of society". What our local society can do is to help increase the influence and increase our customer base.

Again, thank you for allowing me to serve as the President this year. Thank you all for your support and helping me develop and learn from this opportunity. John Dutemple and his team will be stepping into the leadership roles next week, so we shall be in very capable hands. I hope you all enjoy the summer, stay healthy and stay safe!

Treasurer Chair's Report

Submitted by Tim Westrich, CFA, Treasurer

On a preliminary basis, for the fiscal year 2020 (July 1, 2019 thru June 30, 2020), the CFA Society of St. Louis is expected to generate a modest net loss, with our Society's total expenses exceeding total income by \$10,988.72. However, the actual results were an improvement over the forecasted budgeted loss of \$23,385.00.

Our St. Louis CFA Society's income and expenses for the fiscal year are summarized below:

Total Income	\$201,710.76
Total Expenses	\$212,699.48
Net Income	(\$10,988.72)

While we are expecting a net loss for this fiscal year, it is important to note the current cash balance of \$249,717.68, with \$120,539.38 in our Commerce Bank checking account, and an additional \$129,178.30 invested in a Charles Schwab money market account. The cash balance continues to validate that the CFA Society of St. Louis remains in a solid financial position.

To better understand the (\$10,988.72) net income figure, a breakdown of the revenues and expenses follows. The majority of our revenues/funding comes from membership dues, CFA funding, and corporate sponsorships:

Membership Dues	\$64,146.31	31.8%
CFAI Operational & Growth Funding	\$67,260.00	33.3%
Corporate Sponsorship	\$4,930.00	2.4%
Member Events	\$28,348.10	14.1%
Project Funding	\$24,600.00	12.2%
Other Revenues	\$12,426.35	6.2%
Total	\$201,710.76	100.0%

Expenses for the Society's fiscal year are spent on our Member Events (which include lunch meetings, the annual forecast dinner, charter awards dinner, and volunteer events), management fees, and other related CFA programs. The total expense figure is broken down into the following major categories:

Member Events	\$155,601.23	73.2%
Management Fee	\$34,614.90	16.3%
Research Challenge	\$8,617.92	4.1%
Other Expenses	\$13,865.42	6.5%
Total	\$212,699.48	100.0%

Looking back to the beginning of the fiscal year budget proposed by the Treasurer, discussed, and approved by the Board, forecasted net loss for the year was composed of the following:

Total Revenues (budget)	\$219,500
Total Expenses (budget)	\$242,885

Net Projected Loss (budget) (\$23,385)

The biggest discrepancies when comparing beginning of the year budget to the end of year totals is related to Membership Dues (\$64,146.31 actual vs. \$91,000 budget) and Sponsorship (\$16,100 actual vs. \$20,000 budget). However, this shortfall was offset by lower incurred expenses for membership events, the research challenge, scholarship and limited other expenses.

The CFA Society of St. Louis holds a number of membership events throughout the year (approximately 12-15 spread throughout the fiscal year) consisting of lunch and dinner meetings with investment industry experts speaking to our Society on various investment topics, career-related presentations and ethics events, and professional and volunteer networking events. In addition to these Member events, our Society hosts an annual CFA Charter Awards dinner, a volunteer dinner, and the CFA Research Challenge, which is an annual global competition that provides university students with hands-on mentoring and intensive training in financial analysis, preparation of research reports, and presentation of their analysis to a panel of industry experts. These events and programs are the largest percentage of the expenses incurred by our Society on behalf of our membership and community.

With the great assistance of our Society's Executive Director (Joan Hecker) and our Board of Directors, the Treasurer will continue to oversee the fiscal needs of our Society, tailoring our various programming events within the revenues and expenses budgeted throughout the year.

CFA Society of St. Louis

BALANCE SHEET COMPARISON

As of June 30, 2020

	TOTAL	
	AS OF JUN 30, 2020	AS OF JUN 30, 2019 (PY)
ASSETS		
Current Assets		
Bank Accounts		
1110-00 Petty Cash	55.00	55.00
Checking Commerce Bank254101542	129,306.87	159,214.39
Total Bank Accounts	\$129,361.87	\$159,269.39
Other Current Assets		
1140-02 Schwab Money Market Fund	128,542.51	102,218.69
Total Other Current Assets	\$128,542.51	\$102,218.69
Total Current Assets	\$257,904.38	\$261,488.08
Fixed Assets		
Accumulated Depreciation		
Equipment	-117.00	
Total Fixed Assets	\$664.68	\$0.00
TOTAL ASSETS	\$258,569.06	\$261,488.08
LIABILITIES AND EQUITY		
Liabilities		
Total Liabilities		
Equity		
3900-00 Fund Balance	261,488.08	221,061.90
Net Income	-2,919.02	40,426.18
Total Equity	\$258,569.06	\$261,488.08
TOTAL LIABILITIES AND EQUITY	\$258,569.06	\$261,488.08

CFA Society of St. Louis
PROFIT AND LOSS COMPARISON
July 2019 - June 2020

	TOTAL	
	JUL 2019 - JUN 2020	JUL 2018 - JUN 2019 (PY)
Income		
4060-00 Miscellaneous Revenue	1,099.98	
Career Center Royalty (job board)	4,548.80	11,693.33
CFAI Operational Funding - FY 2019		66,660.00
Corporate Sponsorship	4,930.00	22,000.00
Education Income schweis 10% rebate	805.74	
Golf Tournament Income	11,706.50	500.00
Happy Hour income	500.00	
Interest	1,323.82	1,927.99
Job Postings	205.86	100.00
Kaplan Grant	4,005.14	6,269.14
local membership		425.00
Luncheon Meetings	500.00	
Member Events Income	15,641.60	9,245.00
Membership Dues	69,924.97	79,375.00
Membership Dues Student	100.00	
Operation funding 2020	67,260.00	
Product Funding	4,500.00	
project funding		9,625.00
Project funding 70th anniversary	20,100.00	
Research challenge Income	5,450.00	5,850.00
Total Income	\$212,602.41	\$213,670.46
GROSS PROFIT	\$212,602.41	\$213,670.46
Expenses		
5200-00 BOARD OF DIRECTORS	461.31	
5200-01 BD- General Expense	802.63	362.21
5200-03 BD- Meeting Expense	516.54	1,709.18
Total 5200-00 BOARD OF DIRECTORS	1,780.48	2,071.39
5500-00 MEMBERSHIP COMMITTEE		
5500-01 MC Committee General Expense	100.11	
Total 5500-00 MEMBERSHIP COMMITTEE	100.11	
5650-00 LUNCHEON MEETINGS	85.00	
5650-03 LM Printing/Postage	118.98	
Total 5650-00 LUNCHEON MEETINGS	203.98	
Accountant	4,795.00	525.00
5110-02 Legal		11.25
Total Accountant	4,795.00	536.25

CFA Society of St. Louis
PROFIT AND LOSS COMPARISON
July 2019 - June 2020

	TOTAL	
	JUL 2019 - JUN 2020	JUL 2018 - JUN 2019 (PY)
Administrative		
5080-00 Bank Charges	60.00	57.95
General-Postage/Messenger/Copy	356.69	724.51
Supplies	258.77	174.41
Total Administrative	675.46	956.87
cc late fee	-75.00	72.94
cfa branding contribution	4,500.00	
compensation salary survey		1,000.00
Education Candidates		
5310-00 CFA STUDY SESSIONS		
5310-06 CFA Mock Exam Expense	461.20	1,820.40
Total 5310-00 CFA STUDY SESSIONS	461.20	1,820.40
Total Education Candidates	461.20	1,820.40
Golf Tournament	9,496.47	31.19
Management Fee	28,452.80	25,836.00
Marketing	1,131.41	299.19
5400-01 Public Awareness Expense		150.00
Total Marketing	1,131.41	449.19
Member Events Expense	3,283.99	
Annual Forecast Dinner	40,075.98	34,148.13
Annual volunteer dinner	6,407.36	
Charter awards dinner		3,080.85
Lunch Meetings	52,787.57	54,649.46
Post exam party		829.17
Speaker Fees		3,200.00
Trolley Trip	6,698.47	
Womens Initiatives	1,969.00	11,981.44
Total Member Events Expense	111,222.37	107,889.05
Member Events Expense 70th anniversary	37,708.50	
Past President Dinner		1,777.49
quickbooks online service	830.00	720.00
Research Challenge expense FY16-17	1,815.43	
Research Challenge expense FY17-18		78.45
Research Challenge expense FY18-19	681.04	15,870.91
Research Challenge expense FY19-20	6,994.15	
Retirement Conference		10,823.22
Society Development		
Board Lunches	469.01	1,341.83
Travel to conferences	1,541.61	1,969.10
Total Society Development	2,010.62	3,310.93

CFA Society of St. Louis
PROFIT AND LOSS COMPARISON
July 2019 - June 2020

	TOTAL	
	JUL 2019 - JUN 2020	JUL 2018 - JUN 2019 (PY)
Special Dinner	1,319.31	
video cost	1,301.10	
Total Expenses	\$215,404.43	\$173,244.28
NET OPERATING INCOME	\$ -2,802.02	\$40,426.18
Other Expenses		
Depreciation expense	117.00	
Total Other Expenses	\$117.00	\$0.00
NET OTHER INCOME	\$ -117.00	\$0.00
NET INCOME	\$ -2,919.02	\$40,426.18

Membership Chair's Report

Submitted by Brian Cox, CFA

The core objective of the Membership Committee is to promote the advantages and benefits of membership through recruitment, assist potential members through the application process, respond to membership inquiries, and manage existing memberships. Significant areas of activity during the fiscal year in support of these objectives include:

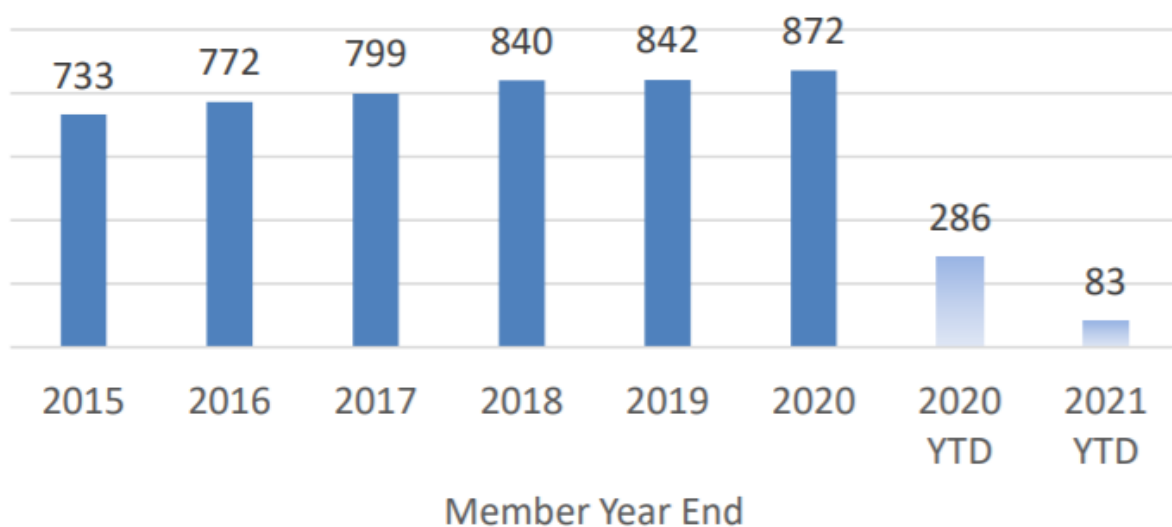
Support the retention of existing members – The 2019 year-end membership renewal rate for the society was 93% which is a slight decline of ~2% versus prior year. The 2020 year-to-date renewal rate is 93.5% which is in line versus prior year for the same period. The society's year-end renewal rate is above the average for societies globally and relatively in line with the renewal rate for CFA Institute membership renewals. Lapsed members were contacted by email to remind them of the benefits of society membership and encourage them to renew. The majority of charterholders that did not renew their society memberships attributed the decision to moving or being relocated out of the Saint Louis area.

Continued growth of the society's membership – As of May 31, 2020 the society had 872 members which is an increase of 3.5% versus prior year end of 842 members. Most of the society's growth is attributed to new members joining during or on completion of the CFA program. 95% of the society's members are CFA charterholders. And the society's top employers are Edward Jones and Wells Fargo with the top member occupations being research/investment analyst and portfolio manager.

Active Society Members

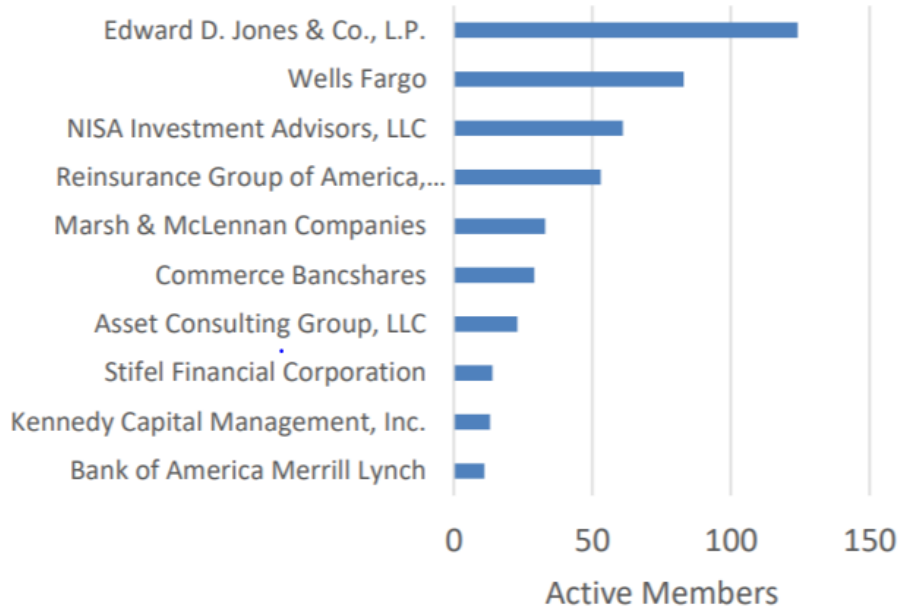
Year-End as of 30 June

Year-to-Date as of 31 May



Top 10 Member Employers

As of May 31st 2020



Top 10 Member Occupations

As of May 31st 2020



Program Chair's Report

Submitted by John Dutemple, CFA

Overview

The CFA Society St. Louis will have hosted or participated in 32 events from July 2019 through June 2020. These include 22 educational events ranging in topic from trucking freight futures markets to the legal cannabis market, two social events, a candidate recruitment event, two Research Challenge events, four society building events, and an inaugural District Dialogue.

Events were held at eight physical locations and virtually, including a new location for the Society, the Limelight in St. Charles. A number of the events were recorded for the benefit of those who could not attend.

Highlights

In November, we celebrated our 70th Anniversary as a Society and welcomed our new Charterholders at a dinner at the Hilton Frontenac. We were honored to have the new CEO of the CFA Institute; Marg Franklin speak and present the new charters. Many thanks to Nong Lin and Joan Hecker for making this event a success.

Our annual Forecast Dinner in late January featured Brian Wesbury of First Trust. A few weeks later, Dr. James Bullard, President & CEO of the Federal Reserve Bank of St. Louis spoke to the membership at the MAC, a semi-annual event that always draws a large crowd and media attention.

At the end of February, our last in-person educational event, we were lucky to have researcher and author Rob Arnott speak to us at the Hilton.

District Dialogue

In early February, we invited Blaine Luetkemeyer, U.S. Representative for Missouri's 3rd District to speak to our members. The event, a first for our Society, was held in St. Charles, part of the 3rd District. Rep. Luetkemeyer is a member of the House Committee on Financial Services. This Dialogue has resulted in further exchanges between our officers, Advocacy Committee, and the Representative's staff. We hope to replicate these Dialogues with the other Representatives whose districts encompass our membership (1st & 2nd).

Virtual Programs

Like most things, in-person program activity was severely impacted by the spread of COVID-19 and the subsequent shut-down of the economy and travel. After a spate of cancelations in March and April, we regrouped and began making available either as host or sponsor, virtual educational programs. These included topics covering women & wealth, ethical decision-making, helping clients deal with adversity, growth vs value, and forecasts. Knowing that our membership depends on the Society to provide interesting content and the opportunity to earn continuing education credit, we began pushing links

to blogs, podcasts, videos, and Institute-produced content on a weekly basis to the members.

Unfortunately, we were unable to host a career fair or other community event late in the year due to local bans on gatherings and, with exams cancelled, so was the post-exam celebration we hold each summer for the exam-takers.

Acknowledgement

Thank you to Joan Hecker who handled the scheduling and logistics for all the events. Thanks to my predecessor, Nong Lin who lined up many of the speakers and spearheaded the 70th Anniversary event. And a big thank you to the members of the Program Committee who met early in the year to provide ideas and inspiration, especially those who lined up presenters for us: Dan Connor, Jack Dwyer, Matt McTague, Christine Sinicrope, Brian Cox, Steve Jones, Areerat Kichkha, and Elizabeth Jourdan.

Communications/Technology Chair Report

Submitted by Steven Kenny

COVID-19 has impacted our communications outreach, as has impacted just about every aspect of our society.

As Universities and our community partners have had to deal with the new reality, they have not been able to devote much content for our local society.

I have reached out to Lindenwood, to provide content for your Student Corner, only to be told they have no content to contribute at this time.

Many of our event that attract CFA members have been cancelled or postponed which leaves little content for our readership.

I have viewed of society's webpages for new content inspiration, but it seems they are struggling as well.

Though I do see some event on the calendar going forward and would like to get the groundwork done for at least hosted some zoom informational event.

Some ideas could be an employment workshop, perhaps hosted by one of our local partners.

Maybe something around political risk investing.

Looking for ways to drive engagement and could use some help from the board.

Sponsorship Chair Report

Submitted by Matt McTague, CFA

The goal for the year was to generate \$20,000 in sponsorship revenue. As always, the longer term objective is to create multi-year relationships with our partners. This year our society generated \$16,100 in sponsorship revenue. The largest revenue generator was the CFA Golf Event, which generated \$7,100. The sponsorship revenue for the golf event allowed us to lower the event cost for participants. We also secured an annual sponsorship for \$2,000 along with sponsorship for three events totaling \$7,000. Under normal circumstances, our events are an extremely efficient way for our partners to meet and entertain clients. This was a challenging year given the shortened in person event schedule, but we were still able to offset many of the costs associated with our events without diluting the quality of each event. Our philosophy is to set up a superior program calendar. Once this is complete, we find sponsors. This is a formula that has worked very well in the past and I believe it will continue to work well in the future.

Advocacy Chair's Report

Submitted by Juli Niemann, CFA

This year Charlottesville took the lead with some helpful virtual seminars for society advocacy efforts in lieu of their in-person meeting. There will be further focus on ethics education as the importance of effective self-regulatory organizations is being scrutinized. Also sponsored were efforts to conduct meetings of local legislators with local societies. The St. Louis Society met with Rep. Blaine Luetkemeyer, R-3rd District, and had a productive meeting concerning issues of mutual concern and establishing future connections. Our on-going process of developing financial responsibility literacy for public and not-for-profit commission/board members and trustees got a boost from new publications from the Institute. Finally, the Institute is undertaking a "trust" study and facilities for thought leadership. Deep thoughts to follow.

Education/University Relations Committee Chair's Report

Submitted by Kristen Steffens, CFA

The Education/University Relations Committee continues its focus on increasing student understanding of the CFA charter, student engagement with the local chapter, and candidate preparedness for the exam. While it was challenging to interact with students after mid-March of 2020 due to the social distancing requirements of COVID-19, the Committee had made progress on key initiatives over the first nine months of the fiscal year.

University Relations

To further increase university relationships, we contacted numerous universities offering to discuss the requirements and merits of the CFA charter with students. This year we

had such discussions at three universities: Lindenwood, St. Louis University, and Webster. Discussions were with undergraduate classes, graduate classes, and student investment organizations. We utilized a panel discussion format with charterholders to continue engagement across a variety of society volunteers. We had begun initial conversations with local high schools in the spring to begin engagement with students earlier in their academic careers and will look to pick that up next fiscal year.

Scholarships

We were allocated and awarded 8 Access Scholarships for the 2020 CFA exams across all three levels. For 2020, we had 18 total applicants. 2019 we had 17 applicants and allocated and awarded 8.

Kaplan scholarships, which fund exam preparation materials for candidates. There were again far fewer applicants for the Kaplan scholarships than for the Access scholarships, and we continue to look for additional methods to increase awareness of the scholarship availability in order to boost the number of applicants in the coming years.

CFA Exam

There were 787 candidates registered to sit for the CFA exams during fiscal 2020 (December 2019 223 and June 2020 564 exams) in the St. Louis region across all levels. Candidates registered for the June 2020 exam were unable to sit for the exam based on the cancelation from the Institute due to COVID-19, thus we are anticipating the majority will sit in December 2020. The mock exam that was scheduled to be held at Des Peres Lodge was canceled this year; we will resume with this event next year.

Kevin Moore will become the new Chair for the Committee officially at the close of this fiscal year. He has been engaged with the Board and me as the current chairperson to help ensure a seamless transition.

CFA Institute Research Challenge Co-Chairs' Report

Submitted by Brendan Du, CFA / Joe Lachky, CFA

Beginning with an initial field of six schools, the Washington University team under the guidance of Professor Tim Solberg topped a field of four presenters at the 10th Annual St. Louis CFA Research Challenge February 28. The afternoon of presentations at the Edward Jones auditorium capped a five-month competition between student teams to analyze a local publicly traded company, Enterprise Bank & Trust (NYSE: EFSC). Local CFA Society members served as graders, judges, mentors, and organizers. Washington University advanced to the Americas Regional competition held virtually but did not make it beyond the first round.

The goal for the upcoming year is to recruit more schools to participate the Research Challenge as dropout always occurs due to personal reasons among student teams between the kickoff and final presentation. The good news is Webster and SIUE schools which have never participated before already showed interest in joining this upcoming year's challenge.

Women in Investment Management

Elizabeth Jourdan CFA

Submitted by Christine Sinicrope, CFA Committee Chair

During the year, the St. Louis CFA Society continued to further the CFA Society's Women in Investment Management (WIM) Initiative. The WIM committee met quarterly during the year and representatives include Tyler Blickhan, Ascension; Elizabeth Jourdan, Mercy Health; Areerat Kichkha, Lindenwood University; Barbara Turley, Commerce Bank; and Christine Sinicrope, Edward Jones. Thank you to all the volunteers and committee members for their support and help during the year!

In 2019/2020, the board members of the St. Louis CFA Society were very supportive of the WIM initiative and provided guidance and support, including applying for and obtaining funding at the national level for the WIM co-sponsored Rock the Street, Wall Street (RTSWS) event. Throughout the year, the speakers and panelists at St. Louis Society events intentionally had significant diverse representation (over 30% female) thanks to efforts from the program committee, WIM committee members and the board.

- In October, the WIM committee co-sponsored the Rock the Street, Wall Street event with STL WIN. This event was a fireside chat with Maura Cunningham, CEO and Founder of RTSWS, and Meredith Jones, RTSWS board member and author of *Women of the Street: Why Female Money Managers Generate Higher Returns (And How You Can Too)* which enabled attendees to learn more about the mission of RTSWS, why diversity matters in the financial services industry, and how to take steps towards improving diversity and inclusion at your workplace.
- Additionally, the WIM committee hosted Rebecca Fender, head of the Future of Finance initiative at CFA Institute, to speak to the St. Louis CFA Society about the Investment Professional of the Future, which highlighted how industry changes will present new challenges and opportunities to today's investment professionals and how individuals can work to differentiate themselves and gain new, desirable skills to adapt to this changing environment.
- The committee had planned to have three additional events in April and May – two speaker events featuring distinguished female investment professionals and a golf clinic networking event. These events were cancelled due to shelter-in-place orders as a result of the coronavirus pandemic and the speakers' preference to reschedule to a later date as opposed to hosting a virtual event. We look forward to bringing this content to the St. Louis CFA Society over the next year, as in-person and/or virtual events.

Past Presidents

William Witherspoon, CFA	1949-1950	Eric Petroff, CFA	2007-2008
Frank X. Keaney	1950-1951	Michael Cody, CFA	2008-2009
Carl L. A. Beckers	1951-1952	Nick Fafoglia, CFA	2009-2010
Haworth F. Hoch	1952-1953	James Ellis, CFA	2010-2011
Walter W. Ainsworth	1953-1954	Steven Jones, CFA	2011-2012
Edward J. Costigan	1954-1955	Brian Wentworth, CFA	2012-2013
John F. Hallett	1955-1956	Joe Walkenbach, CFA	2013-2014
E. D. Toland Jr.	1956-1957	Jack P. Dwyer, CFA	2014-2015
Albert W. Winter	1957-1958	Mike Schoppet, CFA	2015-2015
D. H. Morey	1958-1959	Patrick P. Dwyer, CFA	2015-2016
Henry F. Langenberg	1959-1960	Patrick O'Neil, CFA	2016-2017
George R. Hays	1960-1961	Matt McTague, CFA	2017-2018
Alois T. Bolfig	1961-1962	Paul Simmons, CFA	2018-2019
Francis A. Dunnagan	1962-1963	Nong Lin, Ph.D., CFA	2019-2020
William R. Mead	1963-1964		
J. Marion Engler	1964-1965		
Melvin C. Bahle	1965-1966		
Robert W. M. Kohlsdorf	1966-1967		
Edward E. Haverstick	1967-1968		
Benjamin C. Korschot, CFA	1968-1969		
Charles A. Lebens, CFA	1969-1970		
Hubert E. Anderson, CFA	1970-1971		
William R. Boyd, CFA	1971-1972		
Norman W. Nielsen, CFA	1972-1973		
Thomas H. Hensen	1973-1974		
Warren G. Keinath Jr., CFA	1974-1975		
John H. Blixen, CFA	1975-1976		
William C. O'Fallon	1976-1977		
Ronald F. Londe	1977-1978		
Richard M. Cox	1978-1979		
Jeanine C. Heller, CFA	1979-1980		
Marilyn P. Helmholz, CFA	1980-1981		
David W. Papendick, CFA	1981-1982		
Donald T. Spindel, CFA	1982-1983		
Leonard M. Rubenstein	1983-1984		
Julianne C. Iwersen-Niemann, CFA	1984-1985		
Edward W. Sunder III, CFA	1985-1986		
Manuel K. Pyles, CFA	1986-1987		
Daniel E. Myers, CFA	1987-1988		
Heidi L. Whitfield, CFA	1988-1989		
Bruce C. Fernandez, CFA	1989-1990		
Carol M. Lippman, CFA	1990-1991		
Randall L. Kirkland, CFA	1991-1992		
J.J. Landers Carnal, CFA	1992-1993		
Thomas B. Welch, CFA	1993-1994		
Stephen P. Holmes, CFA	1994-1995		
Nancy C. Messer, CFA	1995-1996		
John W. Zimmerman, CFA	1996-1997		
J. Terri Tanaka, CFA	1997-1998		
Walter F. Czaicki, CFA	1998-1999		
Ann E. Earley, CFA	1999-2000		
Michael J. Ancell, CFA	2000-2001		
David F. Powers, CFA	2001-2002		
Chris T. Blum, CFA	2002-2003		
Robert P. Ensor, CFA	2003-2004		
Scott Colbert, CFA	2004-2005		
Harold Nachtrieb, CFA	2005-2006		
Chris Bloomstran, CFA	2006-2007		

Volunteer of the Year Award recipients

Mike Cody CFA, 2010-2011
Nick Fafoglia CFA, 2011-2012
Nong Lin CFA, Ph.D., 2012-2013
Joseph Walkenbach CFA, 2014-2015
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