



**Annual Report
2021-2022**

CFA Society St. Louis Annual Report 2021-2022

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

(Voting members)

<u>Position</u>	<u>Name</u>
President	Kathleen McGrath, CFA
V.P., Program Chair	Brendan Du, CFA
Treasurer	Tim Westrich, CFA
Secretary	Si Chen, CFA
Immediate Past President	John Dutemple, CFA
Director 2024	Blake Emerson, CFA
Director 2024	Dr. Gaurango Banerjee, CFA
Director 2023	Jack Dwyer, CFA
Director 2023	Fred Strasheim, CFA
Director 2022	Megan St. John, CFA
Director 2022	Matt McTague, CFA

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

<u>Committee</u>	<u>Chair</u>
Programs	Brendan Du, CFA
Communications	Steve Kenney
Research Challenge	Joe Lachky, CFA
Advocacy	Juli Niemann, CFA
Education/University Relations	Kevin Moore, CFA
Membership	Brian Cox, CFA
Technology/Social Media	Steven Kenny
Sponsorship	Matt McTague, CFA/Joan Hecker
WIM	Megan St. John, CFA

President's Report
Respectfully submitted,
Kathleen McGrath, CFA - President

FY22 (July 2021 – June 2022) President's Report

Thank you, members, candidates, and future candidates, for maintaining flexibility over the last year while navigating ongoing COVID impacts and outbreaks. Candidates exhibited patience and endurance while facing exam cancellations and delays alongside adapting to the new testing center format.

Events largely moved to in-person over the year as we were able to transition away from webcast-only events. We maintained a healthy roster of educational and social events, including a sold-out golf tournament at Norwood Hills Country Club and golf clinic at the recently reopened Tower Tee. We thank Brendan Du for his time as Vice President and Program Chair and wish him the best in his new career and move to New York. We are grateful to have Aaron Goeckner step into the role and look forward to transitioning the leadership to him next fiscal year.

Congrats to our winning Research Challenge Team from St. Louis University that ultimately advanced to the sub-regional rounds! The three-student team consisted of Madelyn Pulver, Saikushal Marri, and Jacob Dowell with CFA mentors Aaron Goeckner and Jennifer Rowland alongside faculty advisor Tom Doellman. The students did a tremendous job representing SLU and the CFA Society of St. Louis!

We joined forces with NISA to host a Financial Symposium with the Boys & Girls Club of Great St Louis' Internship Program (SLIP). Thank you to the many volunteer speakers! Our society announced a personal savings match program for students that hit a designated target of savings over the course of the internships this summer. We look forward to hearing back from the program leaders regarding the students' success at the conclusion of the program in August.

Thanks to Joan and her team for meaningfully improving our website and social media presence. We thank Joan for her long-tenured dedication to our Society and extend our deepest gratitude for her ongoing contributions.

Thank you to all that made this past year a success!

Treasurer's Report

Submitted by Timothy Westrich, CFA

For Fiscal Year 2022 (July 1, 2021 through June 30, 2022), the CFA Society St. Louis generated positive net income, with our Society's total income exceeding total expenses by \$51,630.90. The result exceeded the forecasted net income of \$30,000.00.

Our Society's income and expenses for the Fiscal Year are summarized below:

Total Income	\$195,408.42
Total Expenses	\$143,777.52
Net Income	\$51,630.90

The net income generated during fiscal year 2022 further solidified the CFA Society Saint Louis' strong financial position. As a result of net income generated during the fiscal year total current assets increased to \$409,206.62, with \$278,638.51 in the Commerce Bank checking account, and an additional \$130,568.11 invested in the 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 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	\$110,624.05	56.6%
Operational Funding	\$61,596.00	31.5%
Other Revenues	\$23,188.37	11.9%
Total	\$195,408.42	100.0%

Expenses during the Society's fiscal year have historically been 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	\$64,119.20	44.6%
Golf Tournament	\$17,578.24	12.2%
Management Fee	\$29,430.74	20.5%
Research Challenge	\$13,354.28	9.4%
Other Expenses	\$19,195.06	13.4%
Total	\$143,777.52	100.0%

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

Total Revenues (budget)	\$200,000
Total Expenses (budget)	\$170,000
Net Income (budget)	\$30,000

The biggest discrepancy in revenue when comparing the budget to the end of year totals is related to membership dues (\$110,624.05 actual vs. \$100,000 forecast) and operational funding (\$61,596.00 actual vs. \$75,000 forecast). The biggest discrepancy in expenses when comparing the budget to the end of year total is related to membership event expenses (\$64,119.20 actual vs. \$107,000 budget).

The CFA Society of St. Louis holds a number of membership events throughout a typical 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 historically the largest percentage of the expenses incurred by our Society on behalf of our membership and community and it is expected that fiscal year 2023 will represent a continuation of the return to a more typical operating environment with expenses aligning more closely with income forecasts.

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

CFA Society of St. Louis

Balance Sheet Comparison

As of June 30, 2021

	TOTAL	
	AS OF JUN 30, 2021	AS OF JUN 30, 2020 (PY)
ASSETS		
Current Assets		
Bank Accounts		
1110-00 Petty Cash	55.00	55.00
Checking Commerce Bank254101542	228,964.17	128,806.87
Total Bank Accounts	\$229,019.17	\$128,861.87
Other Current Assets		
1140-02 Schwab Money Market Fund	128,556.55	128,542.51
Total Other Current Assets	\$128,556.55	\$128,542.51
Total Current Assets	\$357,575.72	\$257,404.38
Fixed Assets		
Accumulated Depreciation	-273.00	-117.00
Equipment	781.68	781.68
Total Fixed Assets	\$508.68	\$664.68
TOTAL ASSETS	\$358,084.40	\$258,069.06
LIABILITIES AND EQUITY		
Liabilities		
Total Liabilities		
Equity		
3900-00 Fund Balance	258,569.06	261,488.08
Net Income	99,515.34	-3,419.02
Total Equity	\$358,084.40	\$258,069.06
TOTAL LIABILITIES AND EQUITY	\$358,084.40	\$258,069.06

CFA Society of St. Louis

Profit and Loss Comparison

July 2020 - June 2021

	TOTAL	
	JUL 2020 - JUN 2021	JUL 2019 - JUN 2020 (PY)
Income		
4060-00 Miscellaneous Revenue		1,099.98
Career Center Royalty (job board)		4,548.80
Corporate Sponsorship		4,930.00
Education Income schweis 10% rebate		805.74
Golf Tournament Income	5,680.00	11,706.50
Happy Hour income		500.00
Interest	14.04	1,323.82
Job Postings		205.86
Kaplan Grant	126.20	4,005.14
Luncheon Meetings	74.00	
Member Events Income	27.50	15,641.60
Membership Dues	103,217.36	69,924.97
Membership Dues Student		100.00
Operation funding	68,440.00	
Operation funding 2020		67,260.00
Product Funding		4,500.00
Project funding 70th anniversary		20,100.00
Research challenge Income		5,450.00
Total Income	\$177,579.10	\$212,102.41
GROSS PROFIT	\$177,579.10	\$212,102.41
Expenses		
5190-00 General Miscellaneous Expense	500.00	
5200-00 BOARD OF DIRECTORS		461.31
5200-01 BD- General Expense	59.29	802.63
5200-03 BD- Meeting Expense		516.54
Total 5200-00 BOARD OF DIRECTORS	59.29	1,780.48
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
5650-04 LM Miscellaneous	317.58	
5650-05 LM Speaker Expense	189.87	
Total 5650-00 LUNCHEON MEETINGS	507.45	203.98
Accountant	600.00	4,795.00

CFA Society of St. Louis

Profit and Loss Comparison

July 2020 - June 2021

	TOTAL	
	JUL 2020 - JUN 2021	JUL 2019 - JUN 2020 (PY)
Administrative		
5080-00 Bank Charges	60.00	60.00
General-Postage/Messenger/Copy	64.39	356.69
Supplies		258.77
Total Administrative	124.39	675.46
bank supplies	11.45	
cc late fee		-75.00
cfa branding contribution		4,500.00
Education Candidates		
5310-00 CFA STUDY SESSIONS		
5310-06 CFA Mock Exam Expense		461.20
Total 5310-00 CFA STUDY SESSIONS		461.20
Total Education Candidates		461.20
Golf Tournament	12,767.44	9,496.47
Job Postings reimbursement	691.25	
Management Fee	31,057.80	28,452.80
5100-02 Project Fees	3,700.00	
Total Management Fee	34,757.80	28,452.80
Marketing	1,704.00	1,131.41
5400-01 Public Awareness Expense	23.29	
Total Marketing	1,727.29	1,131.41
Member Events Expense	8,400.70	3,283.99
Annual Forecast Dinner		40,075.98
Annual volunteer dinner	952.26	6,407.36
Lunch Meetings	13,494.59	52,787.57
Trolley Trip		6,698.47
Womens Initiatives		1,969.00
Total Member Events Expense	22,847.55	111,222.37
Member Events Expense 70th anniversary		37,708.50
quickbooks online service	770.00	830.00
Research Challenge expense FY16-17		1,815.43
Research Challenge expense FY18-19		681.04
Research Challenge expense FY19-20		6,994.15
Research Challenge expense FY20-21	2,543.85	
Society Development		
Board Lunches		469.01
Travel to conferences		1,541.61
Total Society Development		2,010.62
Special Dinner		1,319.31

CFA Society of St. Louis

Profit and Loss Comparison

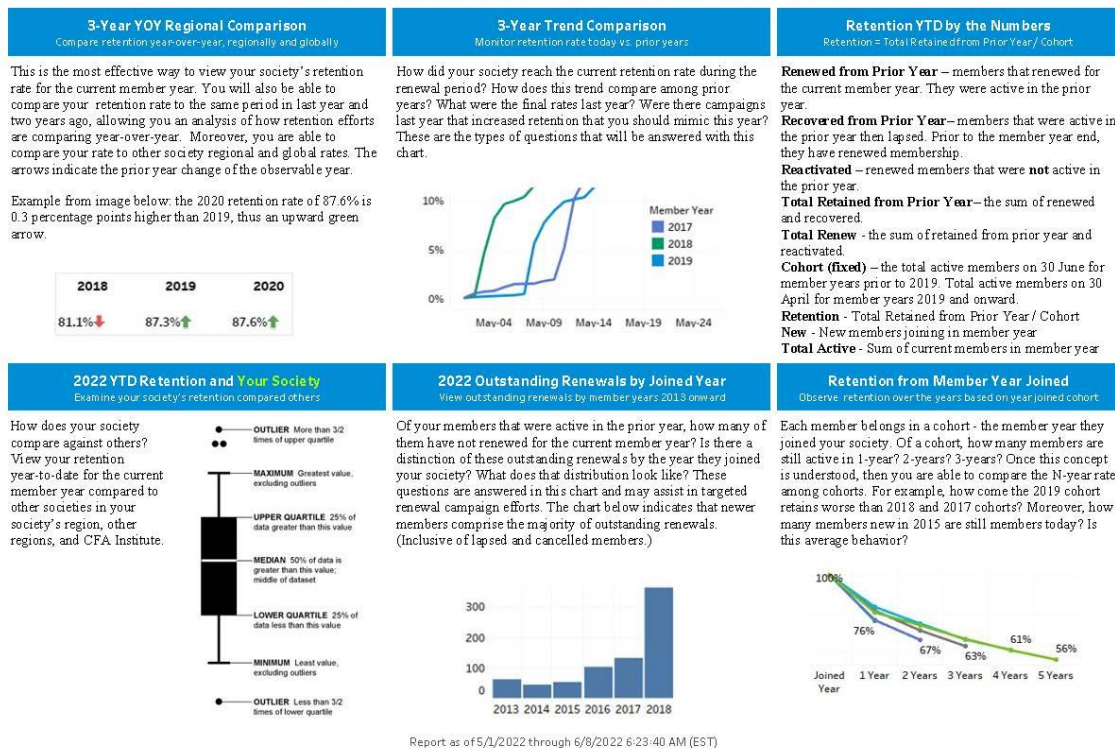
July 2020 - June 2021

	TOTAL	
	JUL 2020 - JUN 2021	JUL 2019 - JUN 2020 (PY)
video cost		1,301.10
Total Expenses	\$77,907.76	\$215,404.43
NET OPERATING INCOME	\$99,671.34	\$ -3,302.02
Other Expenses		
Depreciation expense	156.00	117.00
Total Other Expenses	\$156.00	\$117.00
NET OTHER INCOME	\$ -156.00	\$ -117.00
NET INCOME	\$99,515.34	\$ -3,419.02

Membership Report



How to Interpret the Membership Retention Report



Program Chair's Report

Submitted by *Brendan Du, CFA*

Program offerings started the hybrid format with both in person and online options after COVID situation became better in St. Louis. Although we organized more in person lunch events than the year ago, the in-person attendance was impacted compared to the pre pandemic level due to change to fully remote jobs to many CFA members. Therefore, the online option was a necessity, and we plan to continue that format going forward. While the year was certainly still challenging, we hosted 31 events, spanning a variety of topics. The past year has proven our society can remain strong, connected, and engaged in any environment.

Highlights

- Lunch presentations spanned a breadth of timely topics including sustainable investing, digital currencies, emerging markets, CFA career center, ARK fund strategy, just to name a few.
- Our most successful event was a presentation by Fed President James Bullard in February with over 300 attendees and post-event recaps provided by news outlets throughout the globe that mentioned our society. We plan to organize the presentation as an annual event.

- Also, the happen hour in Clayton came with close to 50 attendees and post work hour events are being considered more to allow members to meet each other given more members are working from home.
- Collaboration efforts were somewhat strengthened by the hybrid environment. The online event besides in person format provided the opportunity to share programs across many local CFA societies and to non-members free of charge.
- We hosted an in-person Spring career fair with 90 attendees which was very successful. We are planning to invite more employers who can do H-1B sponsor as a lot of international students are in St. Louis. The fall career fair is already scheduled due to the success of the Spring one.

Acknowledgement

Thank you to Joan Hecker for handling the logistics and coordination of all events, sourcing content, and working with other local societies to cross promote events. In addition, her team expansion from last year continue to provide our society with post-event recaps and a strengthened social media presence. Joan has been and continues to serve as a foundation of continuity to the Program Committee and many other committees in our society. We extend our deepest gratitude to her and her team. Thank you also to the members of the Program Committee and others that have helped source speakers and content throughout the year.

Communications/Technology Chair Report

Submitted by Steven Kenny

The enhancements and upgrades to our Society webpage along with the improvements to our social media sites has been bearing fruit.

We continue to see increased traffic to our social media sites.

Joan and Teri have been active in boosting high interest posts and including Career Center Job postings and events such as, Member Spotlight, the always popular golf outing and the sold out golf clinic.

The creative social events also help boost engagement both in person and across our social media outlets.

Recent events like Women investment Management Happy Hour and the Python workshop demonstrate out-of-the-box thinking that expands our reach and diversification.

Adding the ESG tab to our website also shows leadership in our society and should draw a broader audience as well.

Joan and Teri will also be reaching out to HR Liaisons and creating special event flyers. Getting down to the statistics:

Our LinkedIn website now has 1480 followers (12 new), 2 shares, 127 page views, 58 unique visitors and 13 post reactions.

CFA STL ranked #1 in MOST NEW LINKED IN POSTS & #3 in TOTAL ENGAGEMENTS in the past 30 days among the top 10 U.S. CFA Societies.

CFA STL ranked **#6 in New & Total LINKED IN FOLLOWERS** in the past 30 days among the top 10 U.S. CFA Societies.

Facebook:

390 followers, (2 new), 36 page views, 73 post reactions and 16 post engagements

CFA STL ranked **#3 in most NEW FACEBOOK POSTS & #5 in most ENGAGEMENT** in the past 30 days over the top 5 U.S. CFA Societies.

Webpage:

Updates to the webpage are also being constantly added including upcoming speaker events on the Events tab and the addition of a downloadable sponsorship form.

Teri was kind enough to provide us with the following statistics

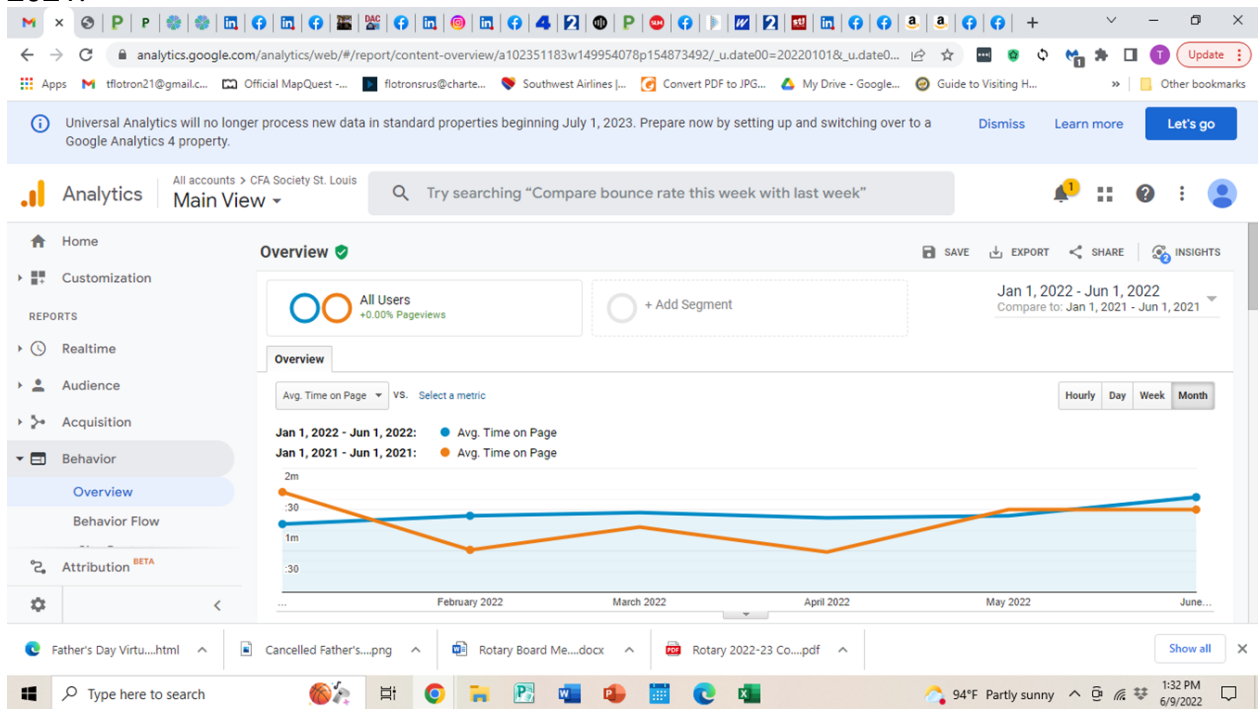
**CFA STL SOCIAL MEDIA PERFORMANCE OVER LAST YEAR
JUNE 2021- JUNE 2022**

LINKED IN		
Analytic	Total	Percentage INCREASE
Total Followers	1482	
New Followers	174	987.5% UP
Competitive Rank in Top 10 CFA Societies	#6 Total Followers	Competitive Rank in Top 10 CFA Societies
Page Views	1910	2,590% UP
Unique Visitors	643	2,281.5% UP
Custom Button Clicks (To Register, More Info, etc)	98	880% UP
Post Reactions	1,267	4,123.3% UP
Post Comments	171	8,450% UP
Shares	68	1,600% UP

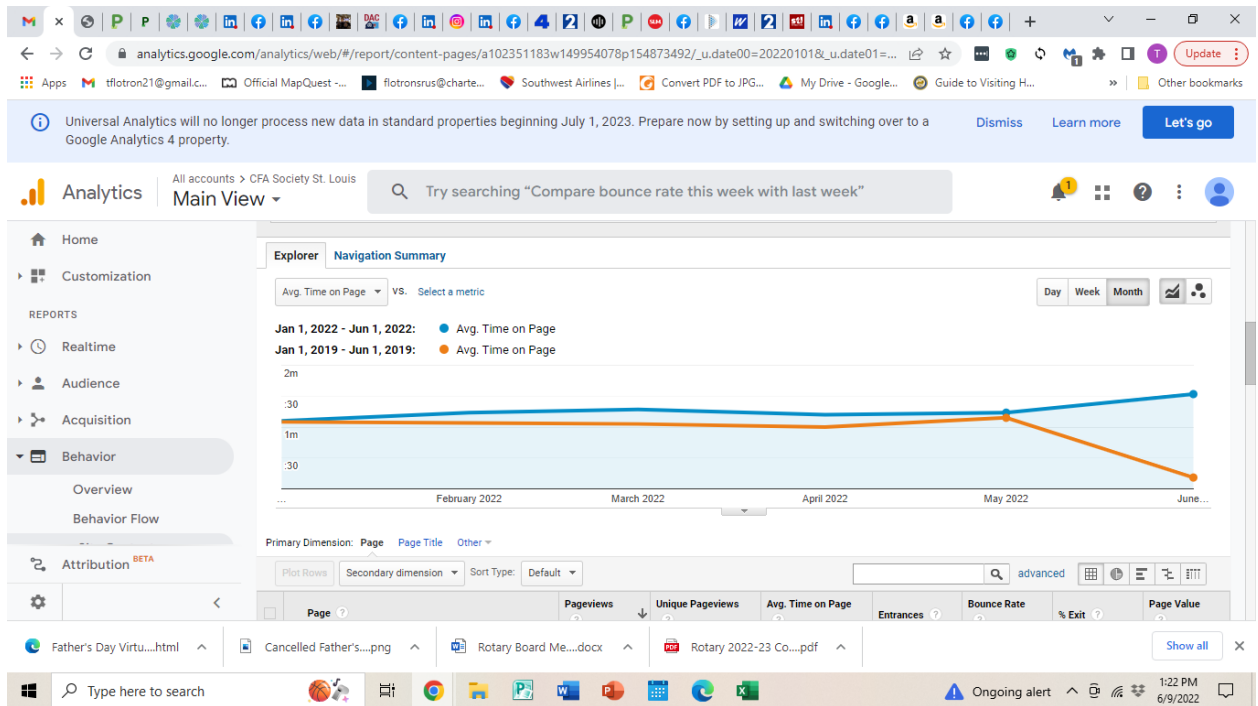
1) AVERAGE TIME SPENT LOOKING AT PAGE: 2022 VS 2021 – 2020 - 2019 – JAN 1-JUNE 1

As the frequency of new CFA STL social media posts increased in May 2022 & CFA events started referring people back to the website, members began spending more time interacting with website pages in 2022 than in

2021.

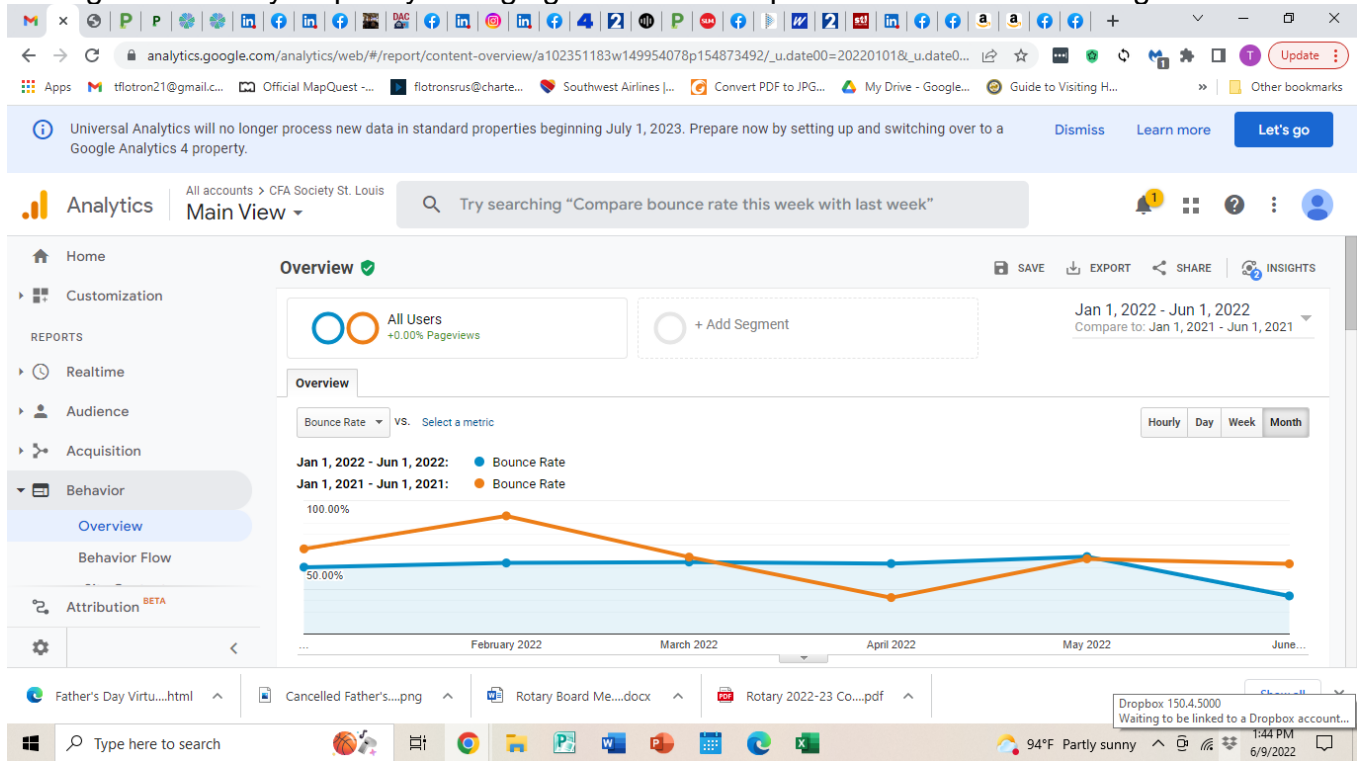


Before COVID. Visitors/Members spent less time per page on the CFA website than they do now in 2022, especially at the start of summer.



2) BOUNCE RATE (VISITS WITH NO INTERACTION WITH PAGE): 2022 VS 2021 – 2020 - 2019 – JAN 1-JUNE 1

This year's visitor/member web page bounce rate improved. It was flat & lower than in 2021, which means more visitors were interacting with the CFA web page they viewed this year. CFA STL's "view one page & leave" bounce rate is 50% or less. The average bounce rate range is 40-55%. Our goal is to aim for a lower rate by end of the year by adding more newsy & quickly changing content to keep visitors/members coming back.



It is clear that the enhancements to our social media platforms have resulted in higher participation rates and more interactions.

It is a positive trend which should continue based on the increase in unique visitors and time spend per page.

Sponsorship Chair Report

Submitted by Matt McTague, CFA

This year our society generated \$11,935 in sponsorship revenue. As always, the longer term objective is to create multi-year relationships with our partners. Most of the revenue came from two events, the forecast dinner and the golf tournament. The forecast dinner had \$5,000 in sponsorships while the golf tournament had \$5,435.

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.

Event Type

Firm Amount

Golf

Pimco/Gurtin \$1,154

Goldman Sachs \$1,154

Medalist \$1,445

Artisan \$1,445

Asset Consulting Group \$237

Forecast Dinner

T. Rowe Price \$5,000

Happy Hour

Innovator ETFs \$1,500

Totals \$11,935

Education/University Relations Committee Chair's Report

Submitted by Kevin Moore, CFA

The Education/University Relations Committee focuses on increasing student understanding of the CFA charter, student engagement with the local chapter and candidate preparation for the exam. As the outreach efforts continued to evolve as part of the "return to normal", the Committee was able to meet in-person with universities again and was also able to utilize videoconferencing in certain situations.

University Relations

As part of our outreach efforts, we once again contacted over 30 universities offering to discuss the requirements and merits of the CFA charter with students. This year, we presented the CFA curriculum to more than 10 universities, which is an increase from last year. The increase in university contact can mainly be attributed to two new Committee members, Alan Davies and Derek Beiter, that helped tremendously in the outreach efforts this year.

Discussions were with undergraduate classes, graduate classes and student investment organizations. Similar to last year, where appropriate, we presented the CFA

curriculum in conjunction with the CFA Research Challenge Committee, which is led by Joe Lachky, CFA.

Scholarships

With the new format of the CFA Exams, the scholarship review and approval process now falls under the CFA Institute's purview. As such, the CFA St. Louis Society will still have 6 scholarships to award annually, but this responsibility is no longer with the Committee.

That said, we continue to mention scholarship availability when we speak with local colleges and universities, and they are very interested in hearing more information.

CFA Exam

All candidates are now taking the exam in the new computer-based format. As a reminder, Level I is now offered 4 times per year, while Levels II and III are offered twice per year. Since the transition to the new format, we've generally seen pass rates decline across the three levels. The CFA Institute continues to monitor the pass rates and the effects of the new format.

CFA Institute Research Challenge Co-Chairs' Report

Submitted by Blake Emerson, CFA

Chair Joe Lachky, CFA

The Research Challenge was a success in 2022. Due to ongoing COVID complications, the field was smaller than we had originally planned due to some cancellations which impacted several teams. Four teams representing the following schools participated in the challenge: St. Louis University (2 teams), Webster University and Washington University. The four teams competed in the challenge on February 25th at the Ritz Carlton and judges awarded a team from St. Louis University with the first-place finish.

We appreciated the participation from our target company, ESCO Technologies (ESCO), whose C-suite joined us in late 2021 for a kick-off meeting at the Ritz Carlton. Teams were engaged in dialogue with the executive team at the event.

We'd like to recognize the following:

- Joan Hecker - Her efforts to organize logistics for not only the research challenge, but also the kickoff meetings and committee Zoom meetings, were invaluable. She also provided support by communicating with several school teams as they had ongoing questions as they prepared for the challenge.
- Mentors - The students benefited from mentorship from the guidance of several members of the CFA Society and provided incredible support to the aims of our committee. Tom Eidelman, Jennifer Rowland and Ryan Bouchard were invaluable.
- Joe Lachky - He's had a multi-year run as the head of the research committee and we appreciate his ongoing commitment to this mission.

For this coming year, we recognize the need to garner even more interest amongst the schools in our network and focus on expanding our reach to new schools that have not historically participated. Joe has already secured involvement from a local public

company for the 2023 event and others on the committee have other relationships with public company executives that are providing a strong pipeline of target companies next year and in years to come.

Women in Investment Management

Submitted by Megan St. John, CFA

Period Report Covers: July 2021 - June 2022

Committee Chair: Megan St. John

CFA Committee Members:

- Areerat Kichkha
- Megan St. John, CFA
- An(Wuli) Okwuashi
- Morgan Koenig, CFA

Committee Objectives and Metrics

Objective	Results
Contribute to programming through recommending female and diverse speakers as well as events/speaker topics	<ul style="list-style-type: none"> ● WIM Committee member Areerat joined Programs Committee in July 2021 and served as a liaison to help propose/host ● ● various diverse speakers and topics (2 events were incorporated into programming based on WIM committee ideation & securing speakers) ● Recommended and help create Golf Clinic event planned for June 2022 ● Hosted a WIM Committee Happy Hour in May 2022
Collaborate with other local professional organizations (STL WIN, etc.)	<ul style="list-style-type: none"> ● Hosted of first of its kind event for diverse, low-income students who are a part of the St. Louis Internship Program (member of Boys & Girls Club) in partnership with STL WIN & NISA.

Summary of Recent Accomplishments:

- **5/12 – WIM Committee Happy Hour**
 - Event was intentionally capped to stay within size of table that would not require paying for a room and was filled.

- Day of the event temperatures were over 90+ and group believes the lack of turnout was partly due to the extreme heat and the event being on a patio.
- 4 people did attend and great discussion was had on diversity in the industry and national WIM collaborative; however, we would have liked to have had better turn out.
- **6/7 – *Boys & Girls Club Business Career Symposium***
 - Event featured our very own Kevin Moore and Kat McGrath as a panelists
 - Day introduced students to careers in investing that was very well received by the students and staff

List of Activities In Progress and Upcoming Events:

- **6/23 – Golf Clinic and Happy Hour**
 - Working to update STL WIN Prescence on STL CFA Website (Morgan)
- Working to identify WIM Collaborative Events to feature in 2022 (Morgan)

Past Presidents

William Witherspoon, CFA	1949-1950
Frank X. Keaney	1950-1951
Carl L. A. Beckers	1951-1952
Haworth F. Hoch	1952-1953
Walter W. Ainsworth	1953-1954
Edward J. Costigan	1954-1955
John F. Hallett	1955-1956
E. D. Toland Jr.	1956-1957
Albert W. Winter	1957-1958
D. H. Morey	1958-1959
Henry F. Langenberg	1959-1960
George R. Hays	1960-1961
Alois T. Bolfig	1961-1962
Francis A. Dunnagan	1962-1963
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
Eric Petroff, CFA	2007-2008
Michael Cody, CFA	2008-2009
Nick Fafoglia, CFA	2009-2010
James Ellis, CFA	2010-2011

Steven Jones, CFA	2011-2012
Brian Wentworth, CFA	2012-2013
Joe Walkenbach, CFA	2013-2014
Jack P. Dwyer, CFA	2014-2015
Mike Schoppet, CFA	2015-2015
Jack P. Dwyer, CFA	2015-2016
Patrick O'Neil, CFA	2016-2017
Matt McTague, CFA	2017-2018
Paul Simmons, CFA	2018-2019
Nong Lin, Ph.D., CFA	2019-2020
John Dutable, CFA	2020-2021

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
Fred Strasheim CFA, 2015-2016
Jack P. Dwyer, CFA 2017-2018
John Dutable, CFA 2018-2019
Christopher Bloomstran, CFA 2019-2020

