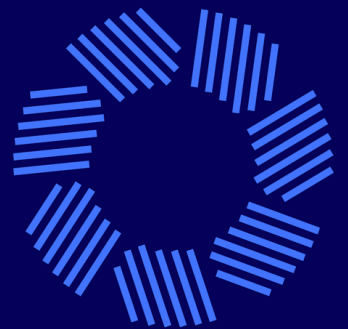


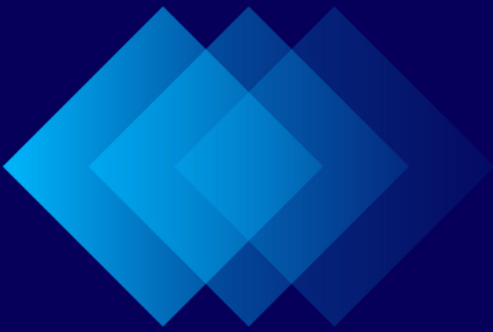


**CFA Society
New Mexico**

2023-2024 ANNUAL REPORT

CFA Society New Mexico





MISSION, VISION & OBJECTIVES

Strategic Plan

The society seeks to fulfill its mission by:

- To develop future professionals through assisting CFA exam candidates and college students to pursue credentialing and careers in investment management and analysis.
- To deliver member value that accelerates the professional success of our members.
- To build market integrity that benefits investors and our members that serve them

As one of CFA Institute member societies, our society connects members to global network of investment professionals.

Mission

To lead the investment profession in the State of New Mexico by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

CFA Society New Mexico Leadership



President
Andrew Hockey



Vice President
Debby Banks



Secretary
JoAnn Trevino



Treasurer
Gabriel Parras



Programs
Paul Ariano



Programs
JJ Milder



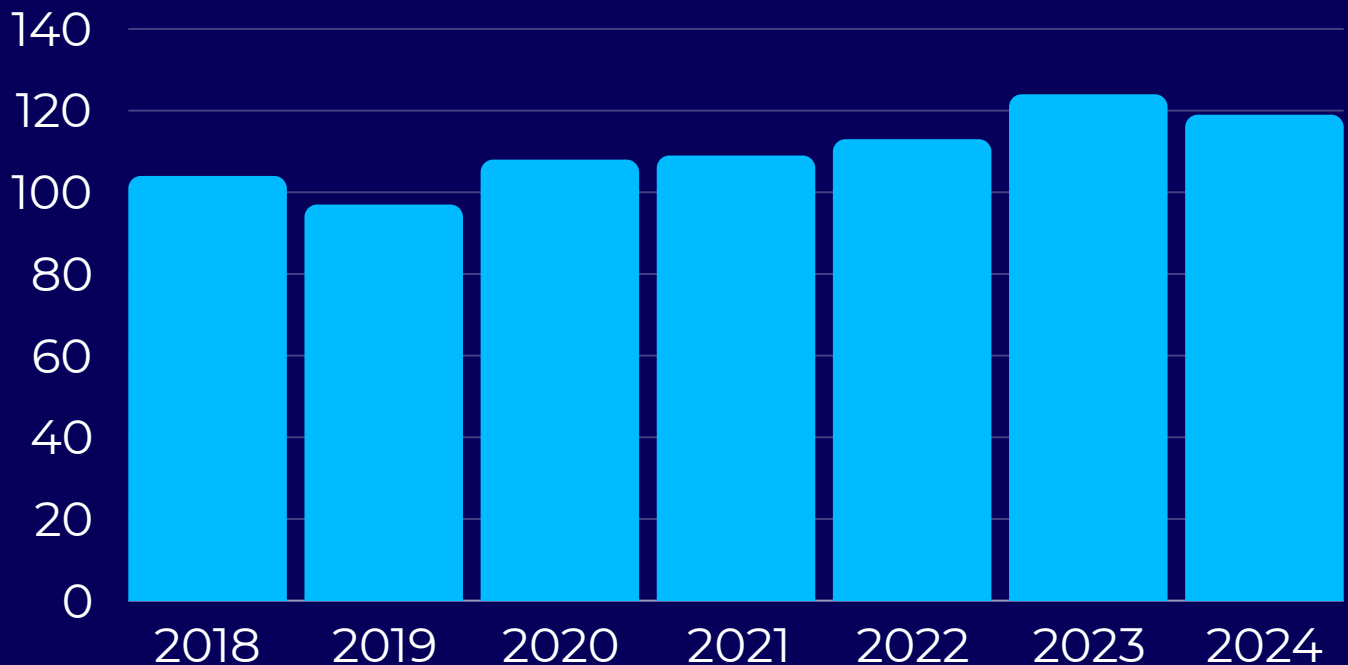
Sponsorship
Sonny Gokhale



Director at Large
Di Zhou

MEMBERSHIP

CFA Society New Mexico Membership



Collaborative WIM Initiative

The Women in Investment Management (WIM) Initiative has been at the forefront for the CFA Institute and CFA Societies worldwide. The CFA Society community around the globe has joined efforts to promote inclusion and diversity in the investment management profession. CFA Society New Mexico continues to be part of this important initiative and we welcomed all members to join the conversation, to follow the initiative on LinkedIn, and to lead the diversity dialogue alongside the incredible community of finance professionals.

Social Media

+ 372 LinkedIn Followers (over 120 posts)

PROGRAMS & EVENTS

- *A History of Securities Fraud Scandals from the 1970s to the Present* | James Park
- *Fall Socials* | Santa Fe Brewing Company & The Alley
- *Deep Dive into the Fast-Growing Active ETF Market* | Maurits Pot & Yuri Khodjamarian
- *23rd Annual Forecast Dinner* | Jennifer Sciubba
- *Spring Socials* | Santa Fe Brewing Company & CHOMP
- *2024 TopGolf Event & Annual Meeting*

FINANCIALS

Income Statement

Fiscal Year June 30th

2024

Income Items

Investments _____	\$579
Job Board _____	\$1,042
CFAI Operating Fund Support _____	\$20,600
Membership Dues _____	\$6,523
Sponsorship _____	\$16,305
Programming & Networking _____	\$4,151
Other Income _____	\$700
Total Income _____	\$49,900

Expense Items

Governance _____	\$3,031
Programming & Networking _____	\$25,740
Operations _____	\$15,896
Total Expense _____	\$44,667

Balance Sheet

Fiscal Year June 30th

2024

Checking _____	\$78,056
Investments _____	\$50,579
Total Assets _____	\$128,635
Liabilities _____	\$0.00
Equity _____	\$128,635
Total Liabilities & Equity _____	\$128,635



CFA Society New Mexico

www.cfasociety.org/newmexico
info@newmexico.cfasociety.org
[@cfasociety-new-mexico](https://twitter.com/cfasociety-new-mexico)