



CFA Society
Stamford

2020 ANNUAL REVIEW



June 2020

cfasociety.org/Stamford

PRESIDENT'S MESSAGE



Kanna Sriskanthan, CFA

As our Society year draws to a close, I wanted to take a moment to reflect upon the global pandemic and challenging environment faced by the world and our members.

In the midst of this, CFA Society Stamford accomplished many milestones:

- Crossing the **700-member mark**, making us now the 26th largest society globally.
- Welcoming of a **record 52 new Charterholders** to our Society.
- **Professionalizing society operations** by hiring our first Executive Director.
- **Significantly increasing our program offerings.**
- Launching the **Frank Talk Podcast Series.**
- Hosting the **2020 Annual Forecast Dinner** with record attendance.
- Activating **virtual platforms** to deliver content to members during the pandemic.

Remaining connected as a professional community is more important now than ever. While nothing can replace in-person meetings, for the near future, we will continue to offer relevant content through virtual events.

Delivering member value while fulfilling our mission of leading the investment profession by promoting the highest standards of ethics, education and professional excellence within our community remains our focus.

I hope you and your family remain safe and healthy and look forward to seeing you at a CFA Stamford Society event soon.

FY20 PROGRAMMING

Over the past year CFA Society Stamford hosted 21 unique programs & events, both in-person and virtual. The Programming Committee worked diligently to bring you content and programs that enhanced knowledge, supported professional development, and facilitated fellowship.

CFA Society Stamford Events

22 August 2019	Annual Summer Social – Crab Shell Restaurant, Stamford, CT
5 September 2019	Currency Surprises and International Stock Market Performance – David Ranson, HCWE & Co.
3 October 2019	Investor Perspectives on ESG Reporting & Analysis – Jeff Cohen, Gail Glazerman, SASB
17 October 2019	UConn Career Panel – UConn Stamford Campus
24 October 2019	Annual Wine Tasting Social – New Canaan, CT
29 October 2019	Local University Research Challenge – Hartford, CT
5 November 2019	Sacred Heart University Career Panel – Fairfield, CT
7 November 2019	Career Series 2020: Optimizing Your LinkedIn Presence – Robert Hellman, Hellman Career Consulting
16 November 2019	Candidate Mock Exam – UConn Stamford Campus
21 November 2019	Career Series 2020: Professional Headshots Photo-shoot
5 December 2019	Graduation Night & Celebration – CFA President & CEO Margaret Franklin, CFA
16 January 2020	2020 Annual Forecast Dinner – Dr. Robert Shiller, Yale University
27 February 2020	Python Basics for Finance Training Session – UConn Stamford Campus
5 March 2020	Career Series 2020: Navigating the Landscape and Creating Opportunities – Rachel Bethlahmy, BraddockMatthews LLC, Michael Castine, ZRG Partners, Aubrey Foerster, City National Rochdale, Sara Katz, Declare, Ian Post, Fifth Set Investment Advisors, LLC

CFA Society Stamford Virtual Events/Webinars

25 March 2020	Sustainable Investment Strategies: Design & Impact – Nicola Fritz, Impax Asset Management, Robert Marsh, JUST Capital, Sandra Myburg, Impact Partners, Hugh Tancred, Stewart Investors
16 April 2020	Financial Advisor Workshop: Preparing for the Sustainable Investing Conversation – Bill Burckart, TIIP & Richard Smyers, Fidelity Labs
23 April 2020	Technology Stocks in the Covid-19 Economy – Steve Milunovich, Wolfe Research
30 April 2020	Greenwich Associates Pandemic Perspectives – Susan Gould, Greenwich Associates
14 May 2020	Career Series 2020: Building a Job Search Plan During Covid-19 – Daniel Troup, AdvantEdge Careers
28 May 2020	Coronavirus Response by Generation – Mike Van Eyk, Capital Guardian
18 June 2020	CFA Society Stamford Annual Meeting – Stephen Horan, CFA, CIPM, CAIA, Managing Director, Americas Region and Professional Learning, CFA Institute



FY20 BY THE NUMBERS

701

ACTIVE MEMBERS

21

**PROGRAMMING
EVENTS**

1030

**Total
Attendees**

TOP 5 EMPLOYERS

(as of 31 May 2020)

- FactSet Research Systems
- Bank of America Merrill Lynch
- State Street Corporation
- Point72 Asset Management
- Morgan Stanley Smith Barney

52

**NEW
CHARTERHOLDERS**

22%

**INCREASE
IN WEBSITE
VISITORS**

(YEAR OVER YEAR) (as of May 2020)

TOP 5 MEMBER OCCUPATIONS

(as of 31 May 2020)

- Portfolio Manager
- Research Analyst, Investment Analyst
- Other (Non-Investment Roles)
- Investment Consultant
- Financial Adviser/Planner/Wealth Management

ANNUAL FORECAST DINNER

222

ATTENDEES

CAREER SERIES 2020

142 **4** Sessions
Attendees

21

**FRANK TALK
PODCASTS**



CFA Society
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PROGRAMMING HIGHLIGHTS

2019 GRADUATION NIGHT CELEBRATION

This year's annual Charter Awards Ceremony was truly a wonderful evening with many of our 52 new Charterholders in attendance. Margaret Franklin, CFA, President & CEO, CFA Institute was our Chief Guest who personally awarded certificates to each new Charterholder. Congratulations again to all our new Charterholders, many of whom became members of CFA Society Stamford in 2019



2019 GRADUATION NIGHT

5 December 2019 | 6:30 PM
Rockrimmon Country Club
Stamford, CT

CFA Society Stamford

SPECIAL GUEST AND SPEAKER
Margaret Franklin, CFA
President & CEO, CFA Institute



95
ATTENDEES





**CFA Society
Stamford**

PROGRAMMING HIGHLIGHTS

CAREER SERIES 2020

In our 2019 Member Engagement survey, the top member request was for more career development and professional branding events. Members wanted real and practical advice that they could put into action. We delivered with the Career Series 2020, a series of events designed to address the skills needed to adapt and succeed in a very changed investment environment and industry. Originally conceived as a series of three events, a fourth program was added in May 2020, directly addressing job search in the Covid-19 era.





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PROGRAMMING HIGHLIGHTS

2020 FORECAST DINNER

In January 2020 we hosted our 18th Annual Forecast Dinner. This year's dinner saw a record attendance of 222 members and guests. This was a 113% increase over our 2019 attendance. The evening's keynote speaker, Noble Laureate, Dr. Robert Shiller shared insights from his latest book and views on the economy. We were also pleased to welcome back Bloomberg's Pimm Fox as the keynote session moderator. Thank you to all who contributed to this special evening.



2020 FORECAST DINNER
16 January 2020 | 6:30 PM
Burning Tree Country Club
Greenwich, CT

KEYNOTE SPEAKER
Dr. Robert Shiller
Nobel Laureate





CFA Society
Stamford

EVENTS



THANK YOU

FROM YOUR FY20 BOARD AND STAFF

OFFICERS & DIRECTORS 2019 -2020

PRESIDENT: Kanna Sriskanthan, CFA

VICE PRESIDENT & SECRETARY: Effy Washnock, CFA

TREASURER: Safia Mehta, CFA

PROGRAMMING & FORECAST DINNER CHAIR: Frank Travers, CFA

PAST PRESIDENT: Mark Hanratty, CFA

ADVOCACY CHAIR: Andrea Dalton, CFA

EDUCATION CHAIR: Tim Van Hooser, CFA

MEMBERSHIP CHAIR: Takashi Ito, CFA

PROGRAMMING CHAIR: Donna Matheson, CFA

PROGRAMMING CHAIR: Keith Morriss, CFA

SPONSORSHIP CHAIR: Andy Hicks, CFA

TECHNOLOGY CHAIR: Jeremy Sforza, CFA

UNIVERSITY RELATIONS: Chair Amy Bibb, CFA

EXECUTIVE DIRECTOR: Margaret Kelleher

