



CFA Society
Austin



CFA Society Austin

Annual General Meeting

June 15, 2016



CFA Society
Austin



Mission Statement

To lead the Austin Investment Community **by delivering** unique, high quality career, education and networking events, **supporting** the highest ethical and professional standards, **for** the ultimate benefit of our membership.



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Current Board

Sharon Criswell, CFA

Deborah Castellani, CFA

Jill Holup CFA

Teofilo Bacungan, CFA

Ian McAbeer CFA

Matt Jachimiak, CFA

Brian King, CFA

Jared Gossett, CFA

Mark Regier, CFA

Tushar Shah, CFA

Tom Villalta, CFA

Rick Sauer, CFA

Brian Aylieff, CFA

President, CFA Societies, Texas Representative

Vice President: Program Chair, Forecast Dinner, Advocacy

Treasurer

Secretary

Audit Chair

Membership Chair

Technology Chair

Communications Chair

Mentorship Chair

University Relations, Scholarship Chair

Programs Co-Chair

Assistant Treasurer, CFA Societies Texas Representative

Past President



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CFA Society Austin Financial Summary

	<u>2014-2015</u>	<u>2015-2016*</u>
REVENUES	\$130,298	\$135,963
EXPENSES	\$94,049	\$105,211
<u>Projected Excess/(Loss)</u>	<u>\$36,249</u>	<u>\$30,752</u>
Beginning Cash: July 1	\$99,658	\$139,596
Ending Cash: * As of May 31, 2016	\$139,596	\$170,132



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2015 - 2016 Highlights

- 449 members – (6 Candidate Members and 1 Student Member)
- **Broader Mission, Bolder Voice, Bigger Community**
 - Integrated Marketing: Website, CC, Social Media
 - Offered 15 programs including:
 - Career events
 - Happy Hours
 - Educational events
 - Texas Traveling Program
 - Partnering with CAIA on Alternative Investments Panel
 - Record Attendance and Sponsorships at 16th Annual Forecast Dinner
 - Initiating Brand Awareness Campaign (\$6,800 funding from CFA Institute)
 - Texas Governor's Proclamation – May 2016 Putting Investors First Month
 - Introduced New Student and Candidate membership Categories
 - Southwest US Research Challenge – 26 schools, 4 states / winners: SMU & UTSA



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CFA SOCIETIES TEXAS

Mission - *To better serve the four independent Texas CFA societies through communication, administration, and collaboration.*

CFA Texas will serve the four Texas societies (Austin, DFW, Houston and San Antonio) by focusing on key issues of regional importance.

Programs

- Promote CE
- Program reciprocity
- Speaker sharing
- Virtual programs
- Texas Investor Portfolio Symposium

Career

- Texas talent
- Employer outreach
- Texas job bank
- Southwest US Research Challenge
- University relations

Advocacy

- Speak as “one voice”
- Texas Legislature

Public Relations

- Raise regional profile
- Branding
- Media & advertising
- Sponsorship opportunities



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CFA Societies Texas Financial Summary

2015-2016*

REVENUES	\$21,094
+ Capital Contributions	\$28,080
EXPENSES	\$27,963
<u>Surplus/(Loss)</u>	<u>\$21,211</u>
Beginning Cash: July 1	\$90,611
Ending Cash: * As of April 30, 2016	\$103,784



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TEXPERS Basic investment Trustee Education (B.I.T.E.)

- Pilot program for CFA Institute to be rolled out to US in 2017 if successful
- Provide retirement plan trustees, administrators, and staff with a clearer understanding of fundamental investment concepts, principles, and relationships while demystifying the terminology and processes used in the investment industry.
- 4 Trainings Set Up – Houston, Dallas (2), and San Antonio
- Goals:
 - Give specialized investment education
 - Broaden the audience to all public and private retirement plan boards



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Thank You Volunteers

David Allen

Scott Brinkman

Robert Butler

Judd Chism

John Criswell

Jeffrey Fisher

Richard Garchitorena

Evan Kist

Jenny Lauderdale

Kevin Lincoln

John Maidlaw

Ryann Marotta

Amy Morrow

Alex Navarro

Neil Patel

Kenneth Price

Stefan Shilgalis

Alan Tarver

Joanna Wang



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CFA Society Austin 2016 – 2017 Board

Deborah Castellani, CFA	President
Thomas Villalta, CFA	Vice President
Teofilo Bacungan, CFA	Secretary
Jill Holup, CFA	Treasurer
John Dashtara, CFA	Director
Jeffrey Fisher, CFA	Director
Richard Garchitorena, CFA	Director
Matthew Jachimiak, CFA	Director
Ryann Marotta, CFA	Director
Tushar Shah, CFA	Director
Evan Kist, CFA	Director (appointed for 1 year term replacing Rick Sauer)
Sharon Criswell, CFA	Past President
Brian Aylieff, CFA	Past President



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Special “THANK YOU”

“Diamond” : Full Year Sponsorships

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TRADING & INVESTMENTS, LLC



WHITEBOX



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In closing



***We raise a glass to you,
our MEMBERS***

with our Sincere THANK YOU!