



Atlanta Society of Finance and Investment Professionals



August 18, 2015

Dear Member,

### **Introduction**

Fellow Atlanta Society members, we achieve a strong society when we are all moving together with our goals and our plans. I will work to help us move along and improve in several areas of our society. With over 1300 members and reaching across Georgia, we are a large and complex organization. Our members have many of the same goals, but they work in different areas with a wide range of clients. Our mission statement for members mentions ethics, education and professionalism as the core of what we do for our clients.

During the past year, we increased the number of events to 28 and attendance to 1600. We focused three events on Future of Finance and hosted the CFA Investment Research Challenge for the Americas and the World finals. We have a tremendous group of volunteers and we have a great deal to be proud of. One constant this year will be an emphasis on communicating more through our website and our newsletter. Our goal is to publish the newsletter every two weeks. One thing I would ask of you is to let us know what you like and what you don't like. Your feedback will help us to make the society more meaningful for all.

### **Plans for 2015-2016**

We have some exciting plans with regard to Programs, Education and Outreach for the coming 2015-2016. In the programs area, we are working on adding Webinars for some of our events. These would allow members to connect with the speaker during a conference call and it would allow us to record the discussion for future playback. For all of our programs, we are trying to have a webinar, video or audio record of the events. With an increasingly widespread and time challenged membership, it would add flexibility to the events. Our calendar has many interesting topics on the schedule, with China, EM bonds, ETF creation, Muni's and Real Estate. We are also having our first Career Building event with a methodology based on Strengthfinder 2.0 (October 28). We are planning more good things to come in 2016.

Our Education for CFA exams is in place with a problems set focused curriculum. We are also introducing Blogs from our society experts. We are asking several society members to publish insights or comments on a monthly basis to enhance the discourse about markets. I have asked the writers to create an online forum for ideas in their particular areas. We have individuals participating with extensive experience in Equity, Fixed Income and Alternatives. If we can raise the level of discussion within our society, then our clients benefit from working with a more informed CFA membership. The Blog will be available at ASFIP.org. Look for it in early September!

Our Outreach efforts came about from our recent Strategic Planning event. We realized that our Technology, Governance and Marketing needs improvement, however, there was something else that kept coming up in our discussions. Do enough people know who we are, and what we do for clients? The answer kept coming back to the fact that we need to do more outreach to get the message out! We are going to create committees to focus these efforts with Employers, University and Community. The CFA Institute has committed to making a greater effort to advertise the advantage of working with CFA members. CFA President Paul Smith will be speaking on this and Future of Finance on November 9. We want the Atlanta community to know we are engaged in continuing the

education process and helping our members to provide solutions. The Community Outreach effort has grown out of many members asking, "How do I use my finance skills to help?" We want to create opportunities which will allow members to impact the community and to advance the cause of financial education. Check out the Outreach efforts on our website under the Connect section.

### **Volunteer**

The society is a non-profit organization. It succeeds with the help of a regular group of volunteers who want to make a difference in our society. I think we can be one of the leading societies in the CFA, and one of the best professional organizations in the Atlanta area. The path to getting there involves more volunteers. We are looking for more members to make all areas as strong as they can be. We are having a Volunteer Appreciation event on August 26 at Gordon Biersch. We will thank last year's volunteers, and we are asking new volunteers to come. Please come out and see some of the best professionals that you could ever hope to work with. There are some interesting areas which could use your input. We have an excellent management team and committees who are looking for member energy to help make an impact. I understand everyone is busy with careers and personal commitments, but there are ways to help build the CFA brand and to enjoy your efforts in the process. The stronger presence we establish as a vibrant organization, the more successful and valued all of us become. Let's make it happen together.

### **Future Opportunity - Foundation**

We have been approached by a donor and have committed resources to begin the establishment of the "ASFIP Foundation". We want this to be a learning experience for local students and to positively impact the community for many years to come. We have all benefitted from a great opportunity to work in a complex environment challenging ourselves in financial markets every day. The Foundation will give local area students a chance to work with experienced members and understand the process of how a foundation works. The grants from the Foundation will allow us to support causes financially in addition to our volunteers supporting with time. The combination of financial and volunteer resources allows us to have an impactful presence in the Atlanta community. The Board of Trustees and the Strategic Advisory Committee unanimously support this idea. Like all of the areas in the organization, we would appreciate your support and insights to make this successful.

There is a lot to be excited about in 2015-2016, please enjoy your time in the society and help us to be great!

Regards,



Stephen P. Davenport, CFA

ASFIP President