



CFA Society
Boston

80
Years

2026 Annual Report



About the Annual Report

Throughout 2025–2026, CFA Society Boston continued to strengthen its role as a leading professional community for investment professionals across Greater Boston and beyond. As we celebrated our 80th anniversary, the Society remained focused on advancing ethical leadership, expanding member engagement, supporting career development, and creating meaningful opportunities for education, networking, and industry collaboration.

Over the past year, we continued to build momentum across several strategic areas, including candidate and university engagement, sustainable investing initiatives, financial literacy programming, digital innovation, strategic partnerships, and member experience enhancements such as the launch of the Connect Mobile App. These efforts reflect our continued commitment to supporting professionals at every stage of their career journey while helping foster a stronger, more connected investment community.

Throughout the following pages, we highlight many of the initiatives, partnerships, events, and accomplishments that shaped this milestone year for the Society. We also look ahead to 2026–2027 with excitement as we continue to expand opportunities for engagement, strengthen industry collaboration, embrace innovation, and support the evolving needs of our members and the broader investment profession.

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CHAIR, MESSAGE FROM ANDREW TUBMAN, CFA

As I reflect on my year serving as Chair of CFA Society Boston, I am filled with gratitude for all that we accomplished together as a community.

This year was an opportunity to celebrate not only the strength and legacy of our Society, but also the extraordinary momentum and engagement of our members. Together, we continued to advance the highest standards of ethics, professionalism, and excellence within the investment industry while deepening the connections that make our community so unique.

CFA Society Boston has long held a special place within the global investment profession, and throughout this past year, that distinction was reinforced time and again. As one of the largest CFA societies in the world, our members represent a remarkable breadth of talent, experience, and leadership across the investment landscape. More importantly, they represent a shared commitment to thoughtful decision-making, professional integrity, and service to the broader community.

One of our primary goals this year was to strengthen member connectivity and continue building a future-ready investment community. I believe we made meaningful progress toward that vision. Through our educational programming, volunteer engagement, thought leadership initiatives, and signature events, including our 40th Annual Market Dinner and celebration of the Society's 80th year, we brought professionals together in ways that fostered collaboration, learning, and lasting relationships.

What made these achievements possible was the dedication of so many individuals. I want to sincerely thank our members for their continued participation, support, and enthusiasm throughout the year. Your engagement is what gives this Society its energy and purpose.

I am equally grateful to our outstanding Board of Directors, committee volunteers, sponsors, and the exceptional CFA Society Boston staff whose professionalism and hard work continue to elevate everything we do. Their commitment behind the scenes made this an incredibly successful and impactful year for our organization.

As I look back on the year, I am optimistic about the future of both CFA Society Boston and the investment profession more broadly. The challenges facing our industry continue to evolve, but so does the strength, resilience, and leadership of this community. I have great confidence that together we will continue to shape a profession grounded in trust, innovation, and excellence for years to come.

Thank you again for the privilege of serving as your Chair.

Andrew Tubman, CFA
Chair, CFA Society Boston Board of Directors

CEO Message



CEO, MESSAGE FROM JEANNE WOLF, CAE

This past year has been an especially meaningful one for CFA Society Boston. As we celebrated our 80th year as a Society, it felt like a natural moment to reflect on the community we have built together and the impact this organization continues to have across the investment profession.

For eight decades, CFA Society Boston has been a place where investment professionals come together to learn, connect, exchange ideas, and uphold the highest standards of ethics and professionalism. That sense of community remains at the heart of who we are, and this year was a powerful reminder of the value of those connections.

We also celebrated the 40th Annual Market Dinner, an important milestone in one of our most longstanding and meaningful traditions. Bringing together members, industry leaders, and partners for thoughtful conversation and shared perspective continues to reinforce the important role our Society plays in the Greater Boston investment community. Events like these give us the opportunity not only to reflect on where our industry is today, but also to consider where it is headed next.

At the same time, this year was also very much about looking ahead. We continued implementing our three-year strategic plan, centered on advancing career and professional development, shaping the workforce of tomorrow, and strengthening the Greater Boston investment community.

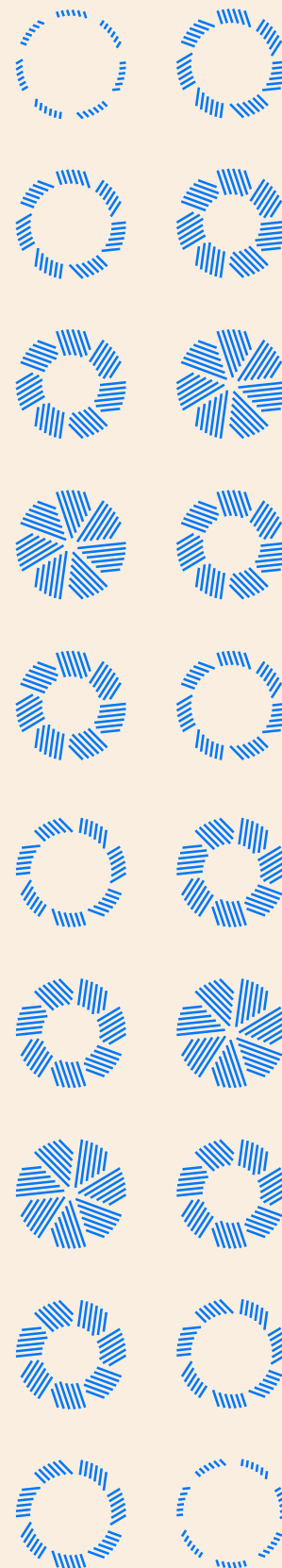
As we continued to move these priorities forward, I was proud of the momentum we created together. We expanded educational programming and professional development opportunities for members at every stage of their careers. We strengthened our relationships with firms, universities, and industry leaders because we believe deeply in the importance of investing in the next generation and helping build a stronger, more inclusive future for our profession. We also continued to create meaningful opportunities for connection, thought leadership, and collaboration – because one of the most important roles we play as a Society is bringing people together in ways that support our members and strengthen the broader investment community.

What makes me most optimistic about the future is the continued engagement and generosity of this community. Our volunteers, committee leaders, speakers, sponsors, and members contribute their time, expertise, and ideas in ways that strengthen the Society and support one another. That collaborative spirit has always defined CFA Society Boston, and it remains one of our greatest strengths as we continue to evolve alongside a changing industry.

As I enter my 17th year at the chief staff executive of the society, my focus remains clear: delivering meaningful value for our members, fostering the next generation of investment leaders, and continuing to position CFA Society Boston as a trusted, forward-looking voice within the profession.

Thank you for being part of this community and for the role each of you plays in shaping its future. I am grateful to be on this journey with you and excited for all that lies ahead.

Warm regards,
Jeanne Wolf, CAE



OUR MISSION

CFA Society Boston members promote the highest ethical standards, best practices and professional development within the investment industry to educate and build trust in the community it serves.

OUR VISION

CFA Society Boston represents a diverse membership of investment professionals positively impacting society through well-informed financial decisions.

OUR STRATEGIC PLAN

CFA Society Boston began implementing a three-year strategic plan in 2025. With the input of society members, volunteers, leadership and staff it was determined the focus would be on 3 main pillars.

Advance Career and Professional Development: Deliver impactful educational opportunities and resources that support lifelong learning and career growth for all members.

Shape the Workforce of Tomorrow: Foster a strong and inclusive talent pipeline by engaging future investment professionals through outreach, mentorship, and institutional partnerships.

Strengthen the Greater Boston Investment Community: Deepen relationships across the finance ecosystem to elevate CFA Charterholder visibility and expand public-facing educational initiatives. Facilitate connections with industry thought leaders through exclusive events and media

Community Snapshot & Membership Demographics

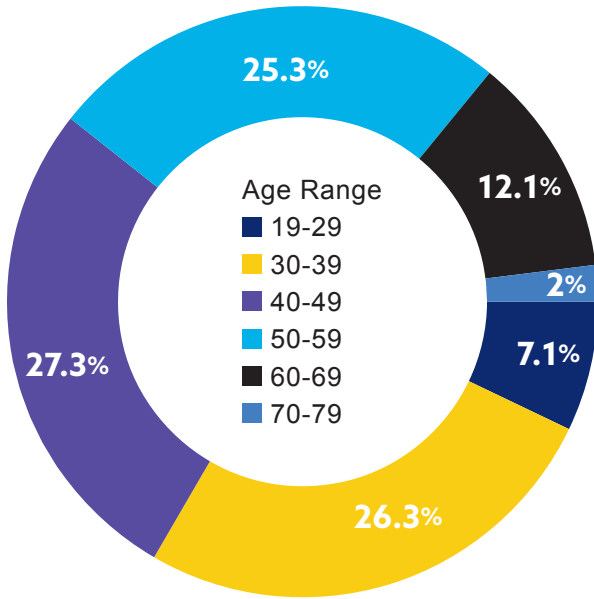
6,203
TOTAL MEMBERS

459
NEW MEMBERS

143
VOLUNTEERS

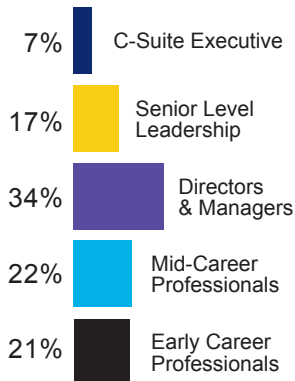
GENDER BREAKDOWN

81% MALE **19%** FEMALE



JOB SENIORITY	
Chief Executive Officer	3%
Chief Financial Officer	4%
Chief Information Officer	4%
Director	5%
Equity Research Analyst	2%
Investment Director	2%
Managing Director	16%
Partner	3%
Portfolio Manager	22%
President	3%
Principal	5%
Quantitative Analyst	4%
Senior Financial Analyst	9%
Vice President	18%

JOB SENIORITY



TOP EMPLOYERS OF CFA CHARTERHOLDERS:

Fidelity
Wellington Management
State Street Corporation
SunLife Financial
Morgan Stanley Smith Barney
Loomis, Sayles & Company
Manulife Financial
Bank of America Merrill Lynch
Ameriprise Financial

Liberty Mutual Investments
Bank of New York Mellon
Cambridge Associates
Franklin Templeton Investments
Old Mutual
Income Research + Management
JP Morgan Chase
GW&K Investment Management



MEMBER EXPERIENCE

Delivering meaningful value at every stage of membership

Member Experience is at the heart of CFA Society Boston's mission and remains a central focus as we continue to strengthen and grow our community. For 80 years, the Society has brought together investment professionals committed to advancing ethical leadership, professional excellence, and lifelong learning. Today, our vibrant community of more than 6,200 members continues to create opportunities to build meaningful relationships, exchange ideas, expand expertise, and stay connected within a rapidly evolving industry.

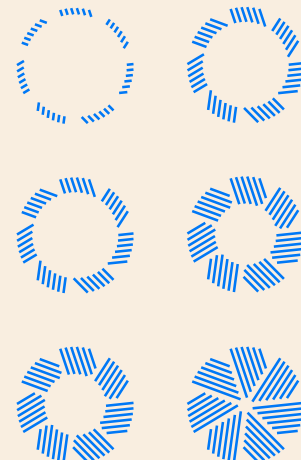
As part of CFA Society Boston's strategic vision for the future, we are focused on advancing career and professional development through impactful educational opportunities, innovative programming, and resources that support members throughout every stage of their careers. Our goal is to ensure members not only gain relevant technical knowledge, but also have access to the connections, perspectives, and experiences that help them grow professionally and personally.

Over the past year, we have continued to expand programming designed to meet the evolving needs of our membership while creating more opportunities for engagement across the Society. From professional development events and thought leadership discussions to networking experiences and volunteer leadership opportunities, we are building a more connected and collaborative member experience that reflects the diverse interests and career paths within our community.

Educational Programming Overview

2025-2026 EVENT OVERVIEW

CFA Society Boston delivered 97 events that attracted 3,245 attendees, including 675 new member attendees. Programming spanned a broad range of professional and investment-focused topics, with Networking, Career Development, and Portfolio Management representing the most frequently offered content areas. Hybrid events continued to be the Society's most common event format, providing members with flexible opportunities to engage throughout the year.



97

TOTAL EVENTS

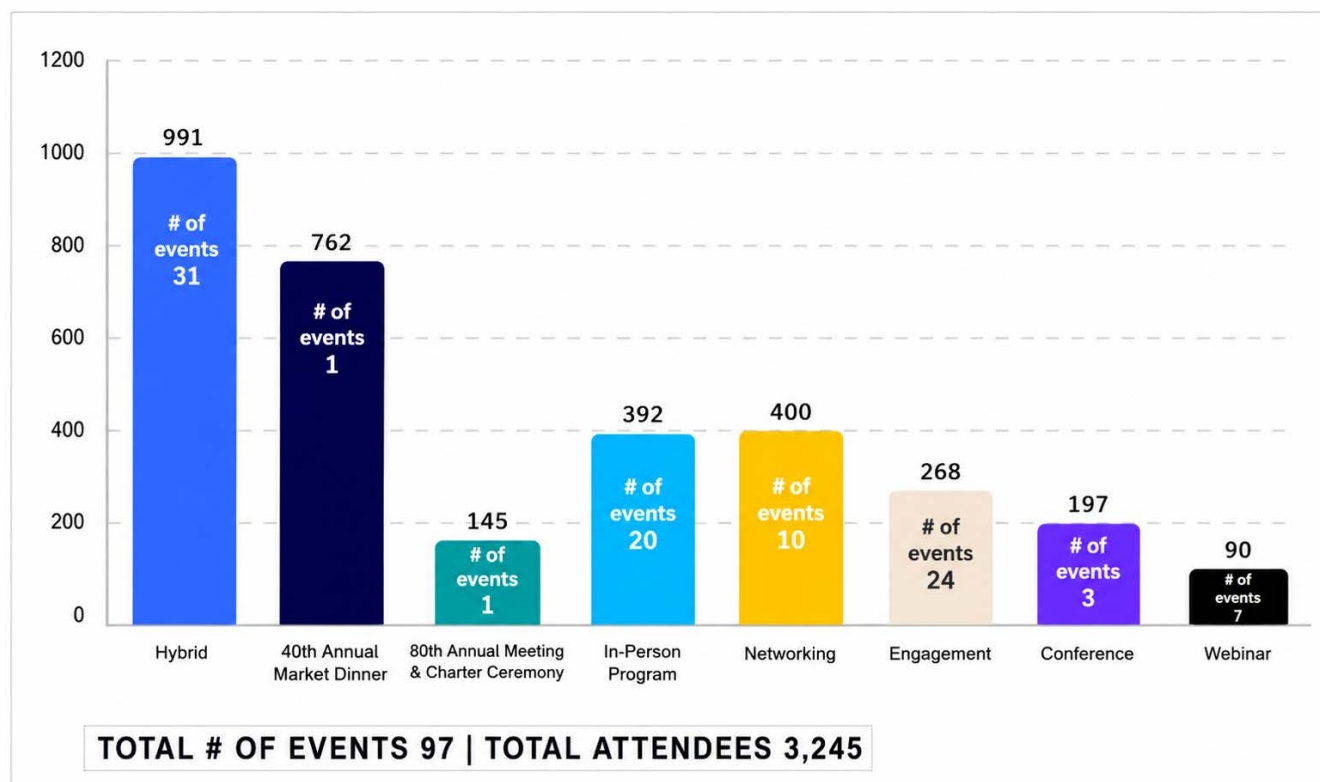
3,245

TOTAL ATTENDANCE

675

TOTAL NEW MEMBER ATTENDANCE

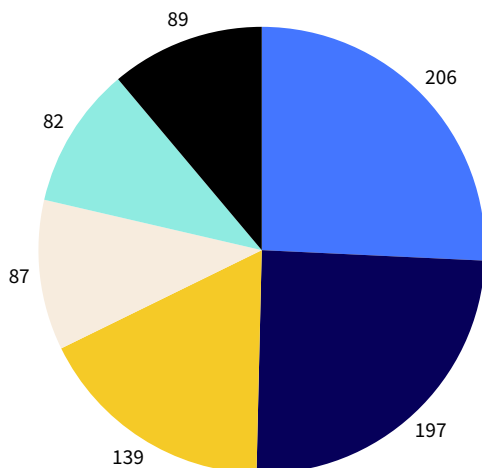
2025-2026 EVENT ANALYSIS



Educational Programming Overview

EVENT TOPIC	EVENTS	ATTENDANCE
Portfolio Management	22	1,336
Networking	35	1,246
Leadership, Management & Communication Skills	10	950
Career Development	35	470
Risk Management	12	350
Fintech	7	301
Alternative Investments	11	275
Fixed Income	6	255
Private Wealth Management	8	213
Sustainable Investing	4	161
Economics	7	157
Equity Investments	10	156
Candidate Education	11	154
Financial Literacy	8	141
Standards, Ethics & Regulations	5	114
Diversity, Equity & Inclusion	10	87
Emerging Leaders	3	66
Derivatives	1	38
Quantitative Methods	3	35
Performance Measurement & Evaluation	1	14
Career Chat	1	10

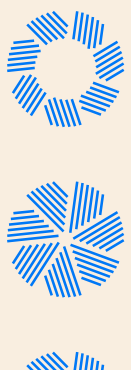
OF NEW MEMBERS



TOPICS



New member participation remained strong throughout 2025-2026, highlighting the Society's ability to connect members with relevant content, professional development resources, and opportunities to build their professional networks.



Signature Events Overview

40TH ANNUAL MARKET DINNER | ATTENDEES: 762

On May 6, 2026, CFA Society Boston celebrated a milestone year at the Boston Marriott Copley Place, marking both the Society's 80th anniversary and the 40th Annual Market Dinner. The event featured a moderated conversation led by Katie Couric with David Fialkow, Jean Hynes, CFA, and Brian Moynihan on *The Future of Investment Management*. Bringing together leaders from across the investment profession, the evening provided a forum for discussion on the evolving landscape of investment management while honoring the Society's longstanding commitment to advancing the investment profession and fostering a vibrant professional community.

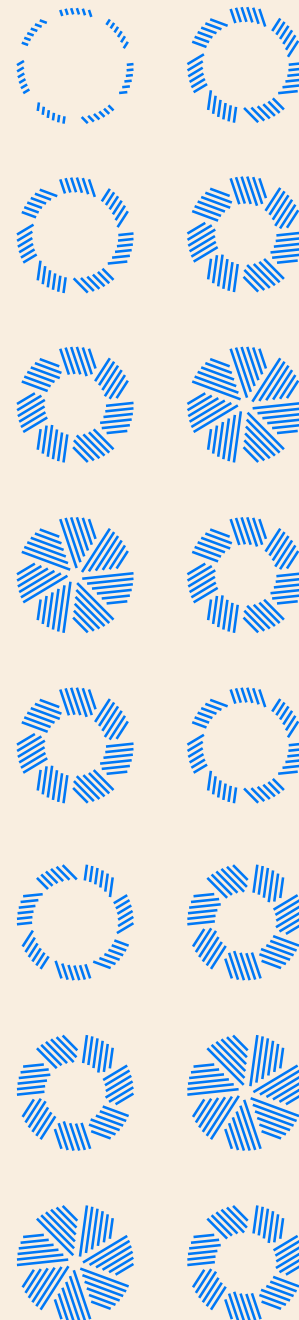
Our featured guests:

Katie Couric, award-winning journalist and Founder of Katie Couric Media

David Fialkow, Co-Founder & Managing Director, General Catalyst

Jean Hynes, CFA, Chief Executive Officer and Managing Partner, Wellington Management

Brian Moynihan, Chair of the Board and Chief Executive Officer, Bank of America



Signature Events Overview



Katie Couric, Founder of Katie Couric Media



From Left to Right: Katie Couric, David Fialkow, Jean Hynes, CFA, Brian Moynihan, Andrew Tubman, CFA (Board Chair, CFA Society Boston), Jeanne Wolf (CEO, CFA Society Boston)

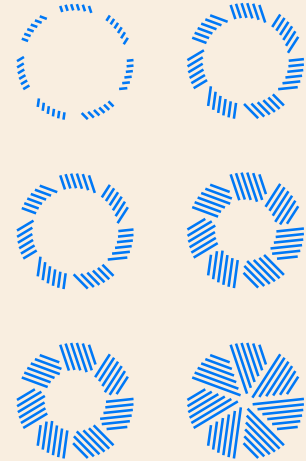


From Left to Right: Katie Couric, Jean Hynes, CFA, David Fialkow, Brian Moynihan

Signature Events Overview

FINANCIAL LITERACY LEADERSHIP SUMMIT ATTENDEES: 94

On April 14, 2026, CFA Society Boston hosted the Financial Literacy Leadership Summit with a keynote address by Massachusetts State Treasurer and Receiver General, Deborah Goldberg, on Strategy, Stewardship, and Outcomes at 100 High Street Place in Boston. The event brought together the Society's strategic partners and alliance organizations to engage in meaningful discussions on financial literacy, explore opportunities for collaboration, and share best practices for advancing financial education and improving outcomes within the communities they serve.



From Left to Right: Deborah Goldberg and Andrew Tubman, CFA



Member Services & Career Development

CFA SOCIETY BOSTON CONNECT MOBILE APP

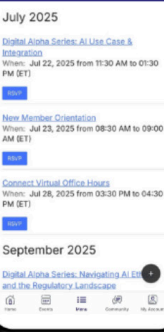
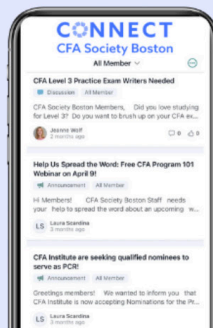
Launched in July 2025, the CFA Society Boston Connect Mobile App was introduced as an all-in-one digital platform designed to enhance member engagement, accessibility, and community connection. The app centralizes key member benefits into a seamless mobile experience, allowing members to stay connected with the Society anytime and anywhere.

The app provides members with convenient access to event registration, volunteering opportunities, topic-based community discussion threads, the Career Center, the Society's podcast, and other member-exclusive resources. By integrating networking, professional development, and member services into a single platform, the app supports a more personalized and accessible member experience.

As a major technology and engagement initiative, the Connect Mobile App strengthens CFA Society Boston's ability to foster professional networking, increase member participation, and deliver resources in a modern, mobile-first format.

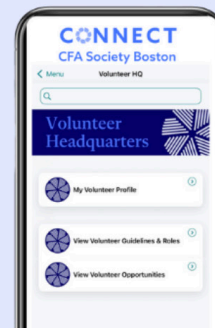
Engage from wherever you are.

Join Connect Communities.



Register for events.

Volunteering made easy.



Member Services & Career Development

MENTOR MATCH PROGRAM

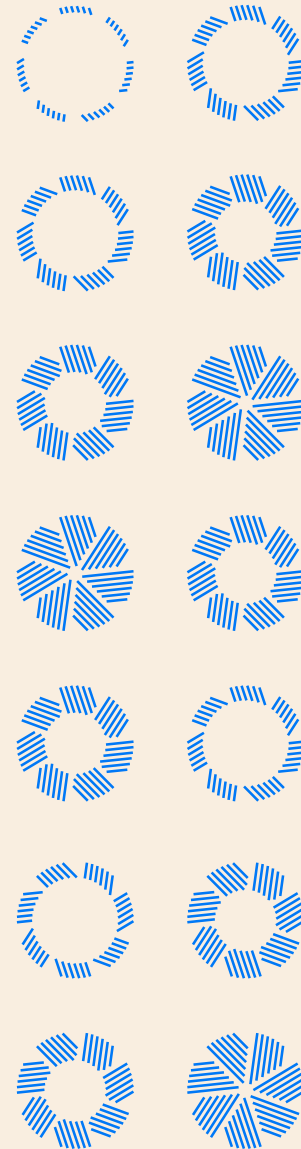
CFA Society Boston's Mentor Match Program continued to connect members across the investment community through meaningful one-on-one mentoring relationships. During 2025-2026 member year the program supported **30 mentor-mentee pairs** and introduced a new Emerging Leaders mentor track, giving rising professionals the opportunity to mentor student and candidate members. Running from November through June, the program combined flexible mentor meetings with networking events designed to support career growth, professional connection, and knowledge sharing across the CFA Society Boston community.

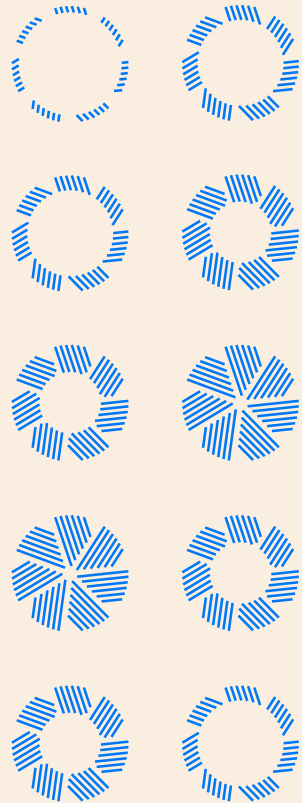
Mentor registration is now open, with mentee registration opening July 1.

CAREER CENTER

The CFA Society Boston Career Center is a professional resource that supports both career advancement and talent recruitment within the investment industry. Through the CFA Institute Job Board, members can explore targeted job opportunities aligned with their skills and interests, while employers can connect with a highly qualified pool of investment professionals.

As a key member benefit, the Career Center strengthens industry connectivity and supports ongoing professional growth across the CFA Society Boston community. We encourage members to continue leveraging this resource to strengthen professional connections, engage with the investment community, and support their ongoing career growth. As an added benefit, Charterholder members receive exclusive early access to job postings through the Career Center, allowing them to view and apply for opportunities before they are made available to the broader community.





VOLUNTEERING OVERVIEW

Volunteers remain at the core of CFA Society Boston’s success and long-standing impact within the investment community. Through the leadership, expertise, and dedication of member volunteers, the Society continues to deliver high-quality programming, professional development opportunities, industry thought leadership, mentorship, career resources, and community engagement initiatives throughout the year.

Across committees, advisory groups, and special initiatives, volunteers contribute their time and knowledge to advance the Society’s mission while strengthening connections across the membership community. Their efforts support both the strategic direction and day-to-day operations of the organization, helping CFA Society Boston remain a trusted resource and vibrant professional network for investment professionals across New England.

As part of your membership experience, we encourage you to explore volunteer opportunities within CFA Society Boston, with applications for the upcoming year now open. Visit https://cfaboston.org/CFAB/About/Engagement-/Volunteer_Hub_for_Members for more information.



Volunteering Overview

WE'RE GRATEFUL TO ALL VOLUNTEERS WHO PARTICIPATED IN OUR 2025-2026 MEMBER YEAR!

Career Development Committee

Adam Carl Sherman, CFA, Chair
Bo Wu, CFA, CAIA, Vice Chair
Erik Jefferson, CFA, CAIA, CWS
Shahbaz Khan
Shiva Mehrotra, CFA
Glenn Migliozi, CFA
Victor Shubin, CFA
Janet J. Sung, CFA

Education Advisory Council

Bill Li, CFA, CAIA, Chair,
Education and Programs
Michael Collins, CFA
Constance M. Everson, CFA
Aakash Garg, CFA
Edmund F. Ingalls, Jr., CFA
Erik Jefferson, CFA, CAIA, CWS
Daniel S. Kern, CFA, CFP
Jeffrey K. Kerrigan, CFA
William Krause, CFA
Glenn T. Migliozi, CFA
Christopher Powers, CFA, CAIA, Co-Chair
Patricia Schneider, CFA, Co-Chair
Victor Shubin, CFA
Bo Wu, CFA, CAIA
Qiushi Yu, CFA

Emerging Leaders Committee

Sydney Majka, CFA, Chair
Simon Ospina, CFA, Vice Chair
Bennett Amador, CFA
Priyal Arhatia
Wanmei Ding, CFA
Natalie Fabrizio, CFA
Maria Faleyev, CFA
Anthony Hong, CFA
Matthew Malicki, CFA
Connor McCormack, CFA

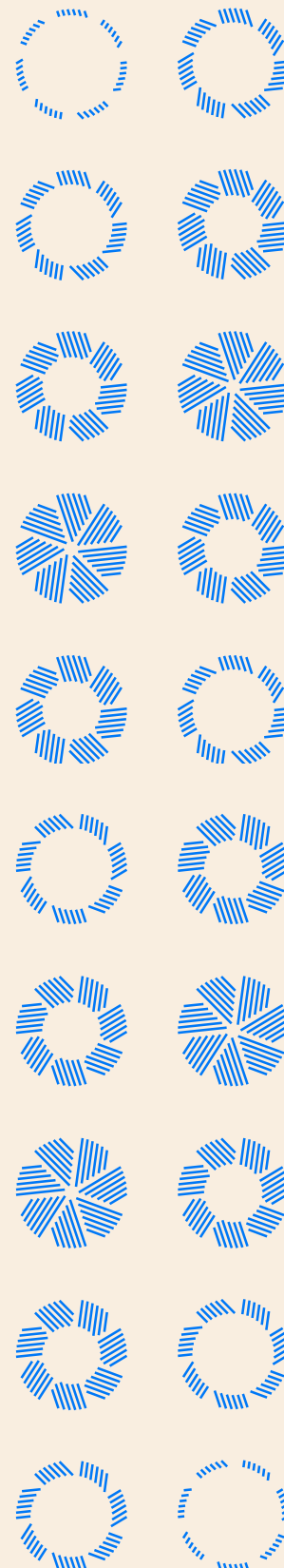
Liam Patrick McManus, CFA
Christine Norton, CFA
Benjamin Jeffrey St Peters, CFA
Qiushi Yu, CFA
Leon Zeng, CFA, CAIA

Financial Literacy Council

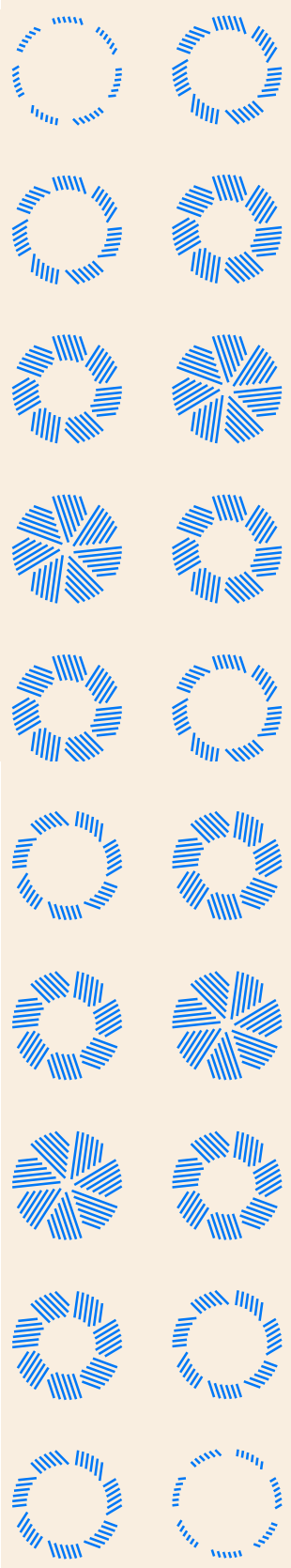
Alice C. Avanian, CFA
Aileen Barbiellini Amidei, CFA
Mary Ellen Eagan, CFA
Jerry K. Holly, Sr.
Laura Lee Levesque, CFA
Joseph G. McDonagh, CFA
Michael E. Mullin, CFA, Co-Chair
Suzanne E. Norman, CIMA, Co-Chair
Rachel C. Sykes, CFA
Eric Wimer, CFA, Co-Chair

Financial Literacy Volunteers

Timothy Jude Aleong, CFA
Alice C. Avanian, CFA
Aileen Barbiellini Amidei, CFA
Jennifer C. Barker, CFA
Ayrton Richard Bernuy Linsbauer
Dino Bojic, CFA
Thomas A. Brugger, CFA
Kevin W. Callahan, CFA
Andrew A. Cipro, CIMA
Aron Joshua Corin, CFA
Joseph Cote Crowley, CFA
Anqi Dong, CFA
James M. Dunlea, CFA
Alexander R. Dyson, CFA
Mary Ellen Eagan, CFA
Julia Eby, CFA
Brian Eisenstein, CFA
Hao Feng, CFA
Abigail Maria Fischer
Aakash Garg, CFA



FINANCIAL LITERACY VOLUNTEERS CONTINUED



Scott Gillespie, CFA
Tyler James Gonsalves
Tirthraj Gajraj Gupta, CFA
Jeremiah K. Holly, Sr.
Michael DeForest Howard-Johnson, CFA
Tiffany Hu, CFA, CPA
Zachary Tyler Hunter
Bret D. Jordan, CFA
Naisha P. Joshi
Jonathan Katz, CFA
Elizabeth S. Kenyon, CFA
Shahbaz Shah Khan
Miranda Si Peng Lam, CFA
Daniel W. Latimore, III, CFA
Thi Ngoc Chau Le
Tom Leung, CFA, FRM
Christopher Levell, CFA
Laura Lee Levesque, CFA
Nathan I. Levin, CFA
Barbara Wall Lobosco
Theo R. Malone, CFA
Allysen Suzanne Mattison, CFA
Timothy J. McCormack, CFA
Joseph G. McDonagh, CFA
Liam Patrick McManus, CFA
Glenn T. Migliozi, CFA
Austin Miller, CFA
Michael Mullin, CFA
Jack Richard Najarian, CFA
Steve Ng, CFA
Suzanne E. Norman, CIMA
Firoza Farhad Panthaki, CFA
Dennis Rattunde, CFA
Christopher Brian Reed, CFA
Casey Riley, CFA
Marion Chase Rockwood, CFA
Matthew M. Roddy, CFA, CAIA
Robert W. Ruffin, CFA
William Racey Scharlotte, CFA
Siddhant Shah

Christine E. Simone, CFA, CAIA, FRM
Gregg R. Smalley, CFA
Brett Smith, CFA
Ryan Nicholas Sullivan, CFA
Rachel C. Sykes, CFA
Mitchell Paul Tappan, CFA
Harsh Hemant Vahalia, CFA, FRM
James C. Veneau, CFA
Xi Zhao Viola, CFA
Irena Vodenska, CFA
David B. Weden, III, CFA
Julian R.M. Wellesley, CFA, ASIP
William Eric Wimer, CFA
Lifan Yang, CFA
Maria Carolina Zarro, CFA
Leon Zeng, CFA
Zhan Zhang
Huaxin Zhang, CFA, CPA

Sustainable Investing Task Force

Richard Fontes, CFA, Chair
Christopher Holcombe, Vice Chair
Jennifer Coombs
Michael J. Greis, CFA
Jake Harnett, CFA
Edmund F. Ingalls, Jr., CFA
Wal Khumalo
Bridget LaPerla
Benjamin Long
Dennis C. Rafferty, CFA
Sharada Regmi, CFA
Henry B. Riter, CFA
Kamal Suppal, CFA
Maxwell Urda, CFA
Allison Walsh, CFA, SASB FSA
Robin Wehbe, CFA, CMT
Qiushi Yu, CFA

Marketing & Communications Impact

SOCIAL MEDIA FOLLOWERS

1,581

INSTAGRAM

1,162

FACEBOOK

5,604

LINKEDIN

1,630

X

TOP ENGAGEMENT POSTS ON LINKEDIN

1.

This year CFA Society Boston is celebrating 80 years of excellence – so we are taking a trip down memory lane with you. The first CFA examination was held on June 15, 1963, with 284 professional investors sitting across 25 locations in the United States. That same year, George Hansen, CFA, founder of BSAS, became the first CFA Charterholder.

Today, more than 190,000 investment professionals have earned the CFA designation worldwide. We are proud to display George Hansen’s charter in the CFA Society Boston home as a tribute to the legacy of our profession. Come check out the first Charter ever awarded next time you are in the CFA Society Boston office!

Reshares: 2

Likes: 195

CELEBRATING

80 YEARS OF EXCELLENCE

2026Since 1946

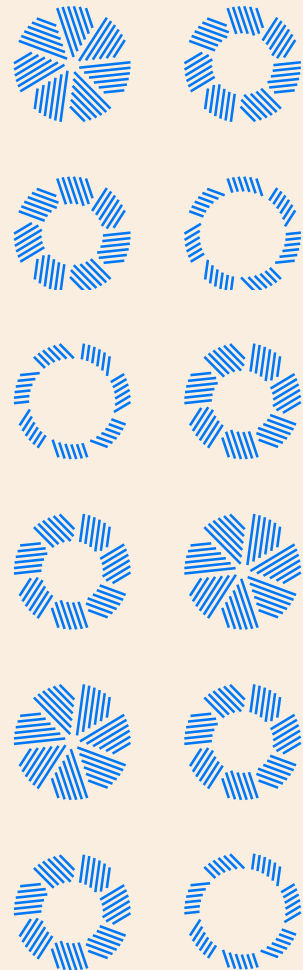


The first CFA Charter was awarded in 1963 to George Hansen, CFA, founder of Boston Security Analysts Society.

The first CFA examination occurred on June 15th, 1963, when 284 professional investors took the exam at 25 locations across the United States. We are honored to display George Hansen's charter in the common space of the CFA Society Boston home. Since then, more than 190,000 investment professionals have become CFA Charterholders.



80
Years



Marketing & Communications Impact

2.

🎉 What a night! Thank you to everyone who joined us at High Street Place Food Hall to celebrate 80 years of CFA Society Boston at our Members Night Out. 🍷 From signature cocktails and great food to reconnecting with friends and meeting new faces, the night was all about celebrating our incredible community of members. Here's to the past 80 years of impact – and to the future we're building together! ❤️

Reshares: 1

Likes: 51



3.

We were delighted to welcome over 100 attendees to this year's Women's Joint Holiday Networking Reception at Clery's on Tuesday, December 9!

In collaboration with [Boston Women in Finance](#), [Women in ETFs](#) Boston, Women in Investing Network & Supporting, [Women Investing for a Sustainable Economy \(WISE\)](#), the Women's Initiative of the [Financial Planning Association of New England](#), and the [MassCPAs](#), the evening brought together investment professionals from across the Greater Boston community for meaningful conversations, new connections, and plenty of smiles. Thank you to everyone who joined us in celebrating community, collaboration, and the power of women supporting women in finance. View the full album on Connect or Facebook and be sure to reshare your favorites on socials! <https://ow.ly/mcnU50XHumB>

Reshares: 6

Likes: 70



Let's Stay Connected

Follow us on Social Media!



@cfasocietyboston



CFA Society Boston



CFA Society Boston



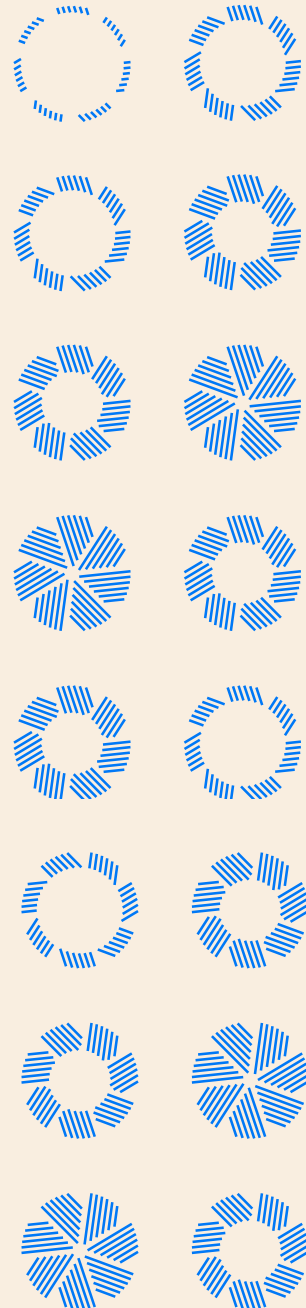
@cfaboston

Marketing & Communications Impact

PUBLIC RELATIONS INITIATIVE

Over the past year, we partnered with Denterlein to support CFA Institute's global "Set the Standard" brand campaign through a localized Boston-focused approach aimed at increasing awareness of the value of the CFA Charter. Through targeted public relations and outreach efforts, their efforts helped raise awareness of Level I Scholarships available through the Society while also generating visibility for key initiatives, including the Financial Literacy Leadership Summit and university-focused events across the region.

As an ongoing partnership, these efforts continue to strengthen engagement with both established investment firms and young professionals exploring careers in finance and investment management. We are excited to continue building on this momentum in the year ahead!

The logo for Denterlein, featuring the name in a blue serif font with a small orange dot above the letter 'i'.

Student & Candidate Engagement Overview

STUDENT ENGAGEMENT

Over the past year, CFA Society Boston continued to strategically expand its University-College Partner Program to strengthen engagement with students and higher education institutions across New England. The program helps introduce students to the investment profession earlier in their academic careers by providing easier access to Society membership, professional networking, educational resources, and industry exposure.

By engaging students earlier in their academic and professional journeys, the program helps expand awareness of the investment industry while fostering meaningful connections with investment professionals and employers. The University-College Partner Program also reinforces the value of Society membership and supports the next generation of finance and investment leaders through increased access to educational resources, networking opportunities, and the broader CFA Society Boston community.

Student Members: 68

Our University Partners

Babson College
Bentley University
Boston College
Clark University
Endicott College
Merrimack College | New in 2026!
Stonehill College
Tufts University
University of Massachusetts Boston | New in 2026!

Student & Candidate Engagement Overview

UNIVERSITY COLLEGE PARTNER EVENTS

Webinar: From Exams to Careers: Insights from CFA Society Boston Members
November 11, 2025

This event provided students and early-career professionals with firsthand insight into the CFA exam experience and career pathways within finance and investment management. Panelists shared practical advice on preparing for the CFA exams, navigating the charterholder journey, and building a successful career in the investment industry.

Attendees: 26

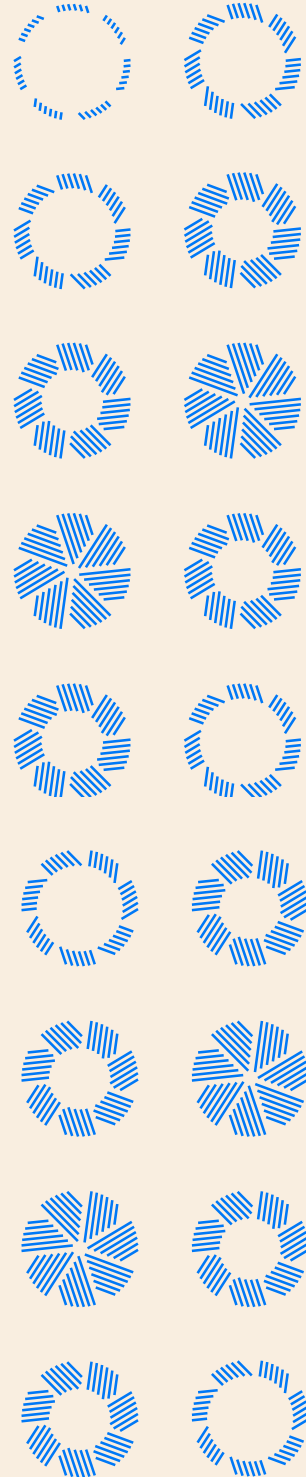
Volunteer Panelists: Anze Podlogar, CFA | Andersen Tax, LLC

Webinar: Getting Started with the CFA Program: What Every Student Should Know
April 22, 2026

This event provided students with an overview of the CFA Program and its evolving career pathways, including portfolio management, private markets, and private wealth. Attendees also heard directly from CFA Charterholders who shared personal experiences preparing for the exams, balancing academics with study commitments, and leveraging the CFA designation and CFA Society Boston membership to build careers and professional networks within the investment industry.

Attendees: 19

Volunteer Panelists: Luke Bala, CFA | Bristol County Savings Banks
David Mardo, CFA | Andersen Tax, LLC



Student & Candidate Engagement Overview

UMass Boston x CFA Society Boston Intro to the CFA Program Event

CFA Society Boston hosted an in-person networking event at UMass Boston designed to introduce undergraduate and graduate finance students to the CFA Program and careers within the investment industry. The event provided students with an overview of how the CFA designation aligns with career opportunities across financial services while also highlighting the benefits of student membership, including networking access, career-focused programming, and engagement with Boston's investment community.



UMass Boston Attendees: 75



UNCF Lighted Pathways Program

For the past 5 years, CFA Society Boston proudly supported the UNCF Lighted Pathways initiative, which is working to address the lack of Black representation within the asset management industry by creating meaningful career pathways for African American undergraduate students interested in investment management.

Through scholarships, internships, mentorship, and professional development opportunities, the program helps students gain exposure to the industry while building the skills, confidence, and connections needed to succeed.

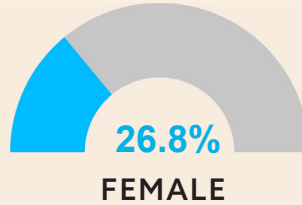
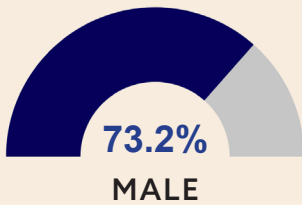
By supporting initiatives like Lighted Pathways, CFA Society Boston continues to help foster a more inclusive and representative investment community while connecting students with professionals, career opportunities, and real-world insight into the many paths available within asset management and finance.



Student & Candidate Engagement Overview

CANDIDATE ENGAGEMENT

CFA Society Boston Candidate Members: 99, Male: 73.2% | Female: 26.8%



CFA Society Boston Level I Scholarships Awarded: 6

CFA Exam Registrations

Level I

August 2025: 244
 November 2025: 311
 February 2026: 278
 May 2026: 387
 Total: 1,220

Level II

August 2025: 108
 November 2025: 189
 May 2026: 323
 Total: 620

Level III

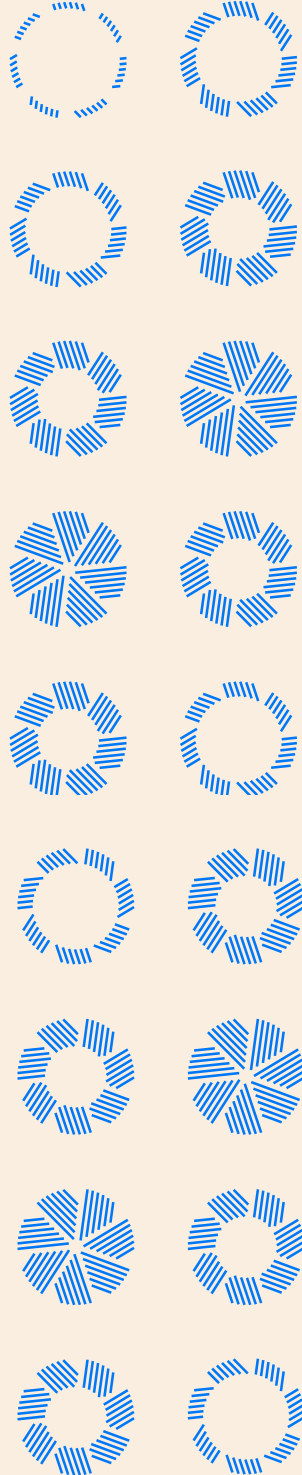
August 2025: 152
 February 2026: 189
 Total: 341

The Exam Is Over Networking Events

CFA Society Boston hosted four Exam is Over Networking Events between September 2025 and May 2026 to celebrate and support CFA candidates following the completion of their Level I, II, and III exams. These casual gatherings provided candidates with an opportunity to unwind, connect with peers who shared the same experience, and strengthen their connection to the broader CFA Society Boston community.

By creating space for both celebration and professional networking, the Society continued to support candidates throughout their CFA journey while fostering engagement, community building, and early involvement within the investment profession.

Exam is Over Attendees: 102



Student & Candidate Engagement Overview

Candidate Study Groups

Between August 2025 and May 2026, CFA Society Boston hosted four Candidate Study Groups to support candidates preparing for their Level I, Level II, and Level III CFA exams. The program provided participants with opportunities to connect with fellow candidates, engage with CFA Charterholders through Q&A discussions, and build structured study plans in a collaborative and supportive environment.

Through these study groups, CFA Society Boston continued to support candidates throughout the exam journey by fostering peer connections, encouraging accountability, and providing access to professional insight and mentorship from members of the investment community.

Candidate Study Group Participants: 97

Kaplan Schweser Partnership

CFA Society Boston's partnership with Kaplan Schweser provides CFA candidates with expanded access to exam preparation tools, study resources, and flexible learning options designed to support success throughout the CFA Program journey. By combining local candidate support with Kaplan Schweser's established exam preparation platform, the partnership helps candidates tailor their study approach based on their individual learning needs and schedules.

Through the partnership, candidates gain access to:

- Discounted CFA exam preparation and review resources
- Flexible study tools and technology-driven learning platforms
- Instructor-led review courses and comprehensive study materials
- Free educational resources, including eBooks, webinars, diagnostic exams, and practice questions
- Trial access to Schweser study tools across Level I, Level II, and Level III exam preparation

The partnership reflects CFA Society Boston's continued commitment to supporting candidates throughout every stage of the CFA Program by providing accessible resources, professional guidance, and tools that help candidates prepare with confidence.

KAPLAN
SCHWESER



**CFA Society
Boston**

Student & Candidate Engagement Overview

STUDENT ENGAGEMENT

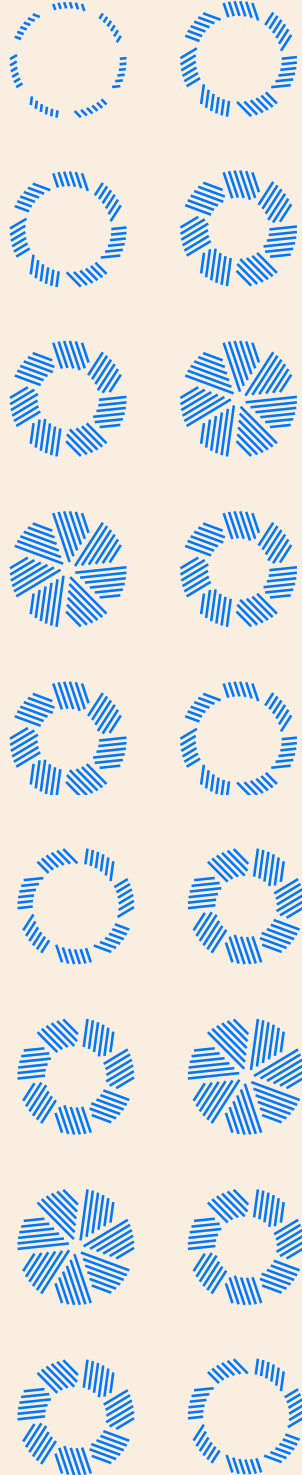
CFA Institute Research Challenge

CFA Society Boston proudly hosted the local CFA Institute Research Challenge competition, giving university students across the Boston area valuable real-world experience in equity research and financial analysis. Through mentorship from investment professionals, students developed and presented investment recommendations while strengthening the analytical, presentation, and teamwork skills needed for careers in the investment industry.

The competition continues to be an important way for CFA Society Boston to support and connect with the next generation of finance professionals through hands-on learning and industry engagement.

CFA Society Boston proudly recognized Western New England University as the 2026 CFA Institute Research Challenge local champion. This year's competition featured 12 university teams that demonstrated exceptional professionalism, analytical rigor, and investment insight, with Babson College, Clark University, and UMass Boston advancing to the final presentation round.

The success of the program was made possible through the support of faculty advisors, industry mentors, report graders, and volunteer judges whose guidance and expertise continue to help develop the next generation of investment professionals.



80TH ANNUAL MEETING AND 2026 CFA[®] CHARTER CEREMONY

We were proud to celebrate our 80th Annual Meeting and 2026 CFA[®] Charter Ceremony by bringing together members, new charterholders, and industry professionals for an evening of recognition, leadership transition, and community connection. During the event, we honored outgoing leadership, welcomed the 2026–2027 officers, and recognized individuals who earned the CFA charter or joined the Society over the past year.

The ceremony reflected the continued growth and strength of our community while celebrating the accomplishments, dedication, and professional milestones of our members.

Charters Awarded: 238

Annual Meeting and Charter Ceremony Attendees: 145



Pamela Yang, CFA, CPA, CGMA of CFA Institute Board of Governors and CFA Society Boston Immediate Past Chair, Andrew Tubman, CFA

CFA Society Boston Board Chair, William Krause, CFA

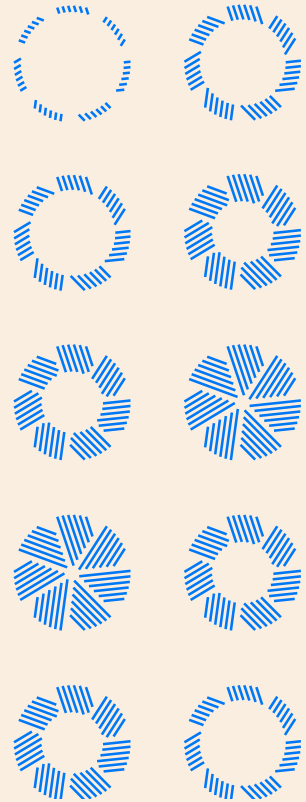
Our Sponsors

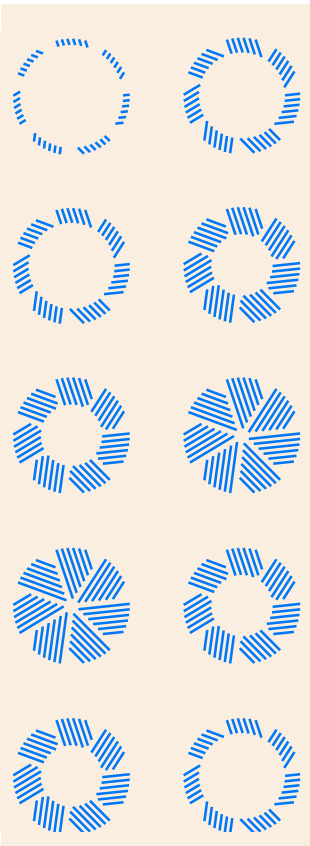
CORPORATE SPONSORSHIPS

Our 2025–2026 Corporate Sponsors played an important role in supporting the Society’s mission to advance ethical leadership, professional excellence, and meaningful engagement across the investment community. Through these strategic partnerships, sponsoring firms aligned with a network committed to shaping the future of the investment profession while strengthening their visibility and connection within Greater Boston’s financial community.

These partnerships helped support year-round programming, educational initiatives, networking opportunities, and member engagement efforts that continue to benefit investment professionals across the region.

Thank you to our 2025-2026 Corporate Sponsors!





SUSTAINABLE INVESTING SPONSORSHIPS

Our 2025–2026 Sustainable Investing Sponsors helped support important industry conversations around sustainable finance, climate risk, impact investing, stewardship, and the evolving future of responsible investing. Through these partnerships, firms aligned their brands with the Society’s commitment to advancing thoughtful dialogue, education, and professional engagement within sustainable investing.

Sponsorship support helped expand the reach and impact of these conferences while creating opportunities for investment professionals to connect, share insights, and engage in discussions shaping the future of the industry.

Thank you to our 2025-2026 Sustainable Investing Sponsors!

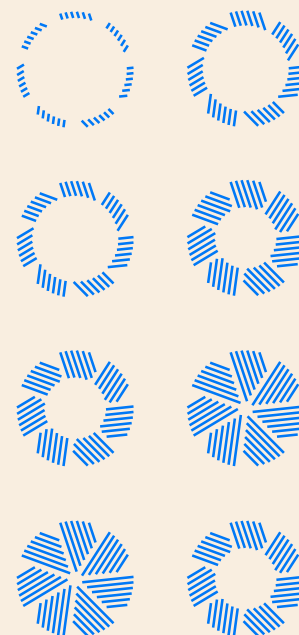


Our Sponsors

40TH ANNUAL MARKET DINNER SPONSORSHIPS

Our 40th Annual Market Dinner Sponsors played a vital role in supporting one of the Society's premier signature events, bringing together leaders across the investment industry for an evening of thought leadership, networking, and industry dialogue. Moderated by Katie Couric, the distinguished panel featured David Fialkow, Jean Hynes, CFA, and Brian Moynihan, who shared perspectives on the future of investment management and the evolving financial landscape.

We thank the firms whose support helped strengthen engagement and connection across Greater Boston's investment community. The sold-out sponsorship levels reflected the continued impact and prestige of the Annual Market Dinner. Thank you to all of our sponsors!



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Jean Hynes, CFA

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DWS

F.L. Putnam Investment
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Longfellow Investment
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Merganser Capital Management
MFS Investment Management

Middleton & Company
Northern Trust
Oaktree Capital Management
Parametric
PGIM / Jennison
Prime Buchholz LLC
SLC Management
State Street Investment
Management
T. Rowe Price
Voya Investment Management
Waystone
WinCap Financial
Woodstock Corp.

CFA Society Boston Connect Mobile App

In August 2025, we officially launched the CFA Society Boston Connect Mobile App as part of our continued commitment to creating a more connected, accessible, and engaging member experience. Over the past year, the app has become an important extension of the Society by giving members a centralized digital hub to stay informed, build professional relationships, and engage with the investment community anytime and anywhere.

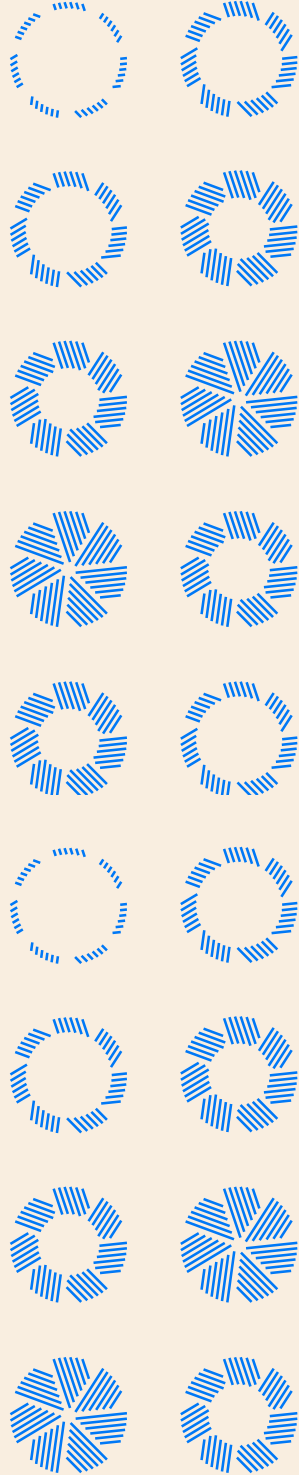
The app was designed to make it easier for members to access the resources, programming, and connections that matter most. As member engagement continues to evolve in a more mobile and digital-first environment, the app helps ensure that networking, professional development, and Society involvement remain convenient and accessible beyond traditional events and email communications.

Through the Connect Mobile App, members can:

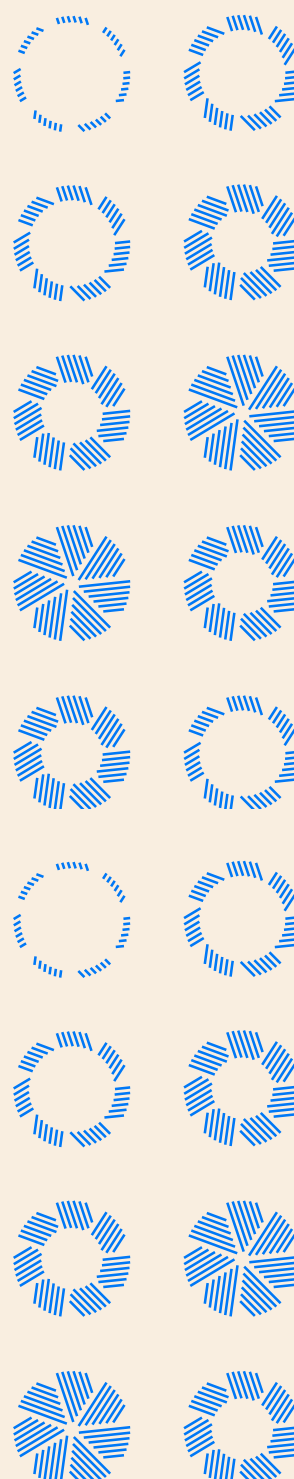
- Register for upcoming events and programs
- Explore volunteering opportunities and Society initiatives
- Participate in topic-based discussion communities and networking conversations
- Access the Career Center and professional development resources
- Listen to the Society’s podcast and engage with member-exclusive content
- Stay connected with fellow members and industry professionals in real time

The launch of the app also represented an important investment in strengthening member engagement and building a more connected Society community. By bringing together events, conversations, career resources, and networking tools into one platform, the app creates additional opportunities for members to engage with one another throughout the year — not just at in-person events.

As we continue to grow and enhance the platform, we are excited about the opportunities ahead to further expand digital engagement, foster stronger professional connections, and continue delivering value to members through innovative and accessible experiences.



2026-2027 Strategic Priorities

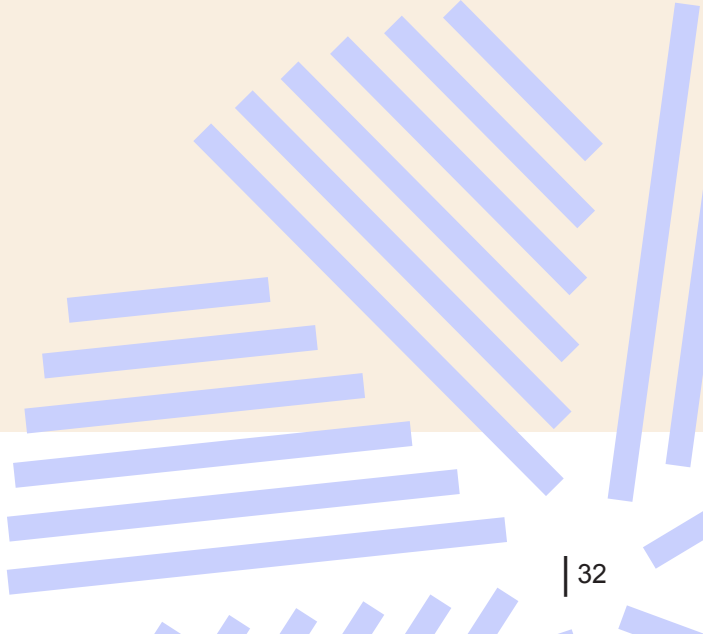


As CFA Society Boston looks ahead to the 2026-2027 member year, the Society is focused on creating more dynamic, engaging, and future-focused experiences for members and the broader investment community. Building on the momentum of the first full year of the 2025-2028 Strategic Plan, the coming year will introduce new ways for members to connect, learn, and grow through innovative programming, expanded thought leadership opportunities, and stronger industry partnerships.

From more interactive networking experiences designed to foster meaningful relationships across the investment ecosystem to new collaborations that elevate the visibility and value of the CFA Charter, the Society is investing in initiatives that reflect the evolving needs of today's investment professionals.

Several exciting initiatives are already underway for the year ahead. CFA Society Boston is launching a new AI Taskforce to explore how emerging technologies are reshaping the profession and to help members navigate the rapidly changing landscape. The Society is also partnering with a public relations firm to strengthen awareness of the CFA Charter and amplify the voice and impact of charterholders throughout the Greater Boston financial community.

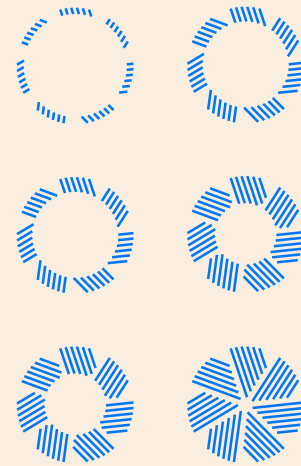
In addition, following the launch of the Connect Mobile App, the Society will continue building a more connected and interactive member experience through gamification, community engagement, and new opportunities for peer-to-peer collaboration. Together, these efforts reflect CFA Society Boston's commitment to inspiring excellence, advancing careers, and empowering community for the next generation of investment professionals.



Leadership & Governance

We extend our appreciation to the 2025–2026 Board of Directors for their outstanding leadership, guidance, and continued dedication throughout the year. Their vision, expertise, and commitment helped strengthen the Society’s impact across member engagement, professional development, strategic growth, and industry leadership.

Through their service and support, the Board played a critical role in advancing the mission of the Society and helping foster a strong, connected, and forward-looking investment community.



CHAIR
Andrew Tubman, CFA



SECRETARY
Patrick Gregory, CFA



VICE CHAIR
William Krause, CFA



CHAIR, EDUCATION PROGRAMS
Bill Li, CFA



TREASURER
Keon Holmes, CFA



PAST CHAIR
Asha Mehta, CFA

Leadership & Governance



DIRECTOR
Kenechukwu Anadu, CFA, CAIA



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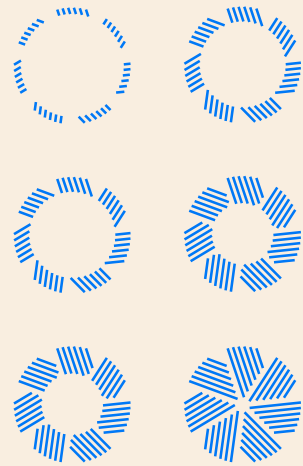


DIRECTOR
Kashif Siddiqui, CFA

Our Staff

The CFA Society Boston staff was honored to support our members and the broader investment community through educational programming, networking events, professional development opportunities, and meaningful member experiences throughout the year.

We are incredibly grateful to our members, volunteers, sponsors, speakers, and community partners whose enthusiasm, collaboration, and support helped make this year so impactful. We could not have done it without you. Get to know the team behind the Society!



Jeanne Wolf, CAE
CEO

Jeanne Wolf is the Chief Executive Officer of CFA Society Boston. In this role, she is responsible for the overall management of the organization. She oversees the board of directors, staff and the governance of CFA Society Boston.

Renee Russo, CAE
COO

Renee Russo is the Chief Operating Officer of CFA Society Boston! She oversees all operations which include - strategic initiative oversight, marketing, communications, human resources, and general office management



Todd Fowler
Director of Education & Events

Todd is the Director of Education and Events. He primarily focuses on the overall management and strategic implementation of educational offerings and events, including vendor relations, contract negotiations, and working closely with members, staff, and volunteer committees.

Our Staff



Caitlin Basler, CAE
Director of Member Technology and Engagement

Caitlin Basler is the Director of Member Technology & Engagement where she oversees the database, engagement platforms and supports the engagement strategy for members. Prior to this role, she managed Programs and Events for the society.

Laura Scardina
Manager, Marketing and Corporate Relations

Laura Scardina is the Manager of Marketing and Corporate Relations at CFA Society Boston! She works directly with the COO to formulate and develop tactical marketing plans that enhance the visibility of CFA Society Boston and its membership. She oversees key initiatives for messaging and value proposition across external communications while identifying new opportunities in trending markets and industry sectors that would complement CFA Society Boston. Laura also works alongside the Director of Member Technology on recruitments and renewals as well as the Director of Education and Events on sponsorships and corporate relations.



Megan Harding
Senior Membership & Marketing Coordinator

Megan Harding is the senior marketing and membership coordinator for CFA Society Boston. She is the eye behind all social media platforms, email marketing, and communication strategies. Megan also oversees membership management and is a constant contact for CFA Society Boston Members.

Mackenzie Godley
Program & Events Coordinator

Mackenzie Godley is the Program and Education Coordinator of CFA Society Boston. In this role, Mackenzie works with the Director of Education and Events to coordinate all live, hybrid, and online programs. She aids in behind the scenes event management as well as any on-site needs.



Jaclyn Lawlor
Support Coordinator

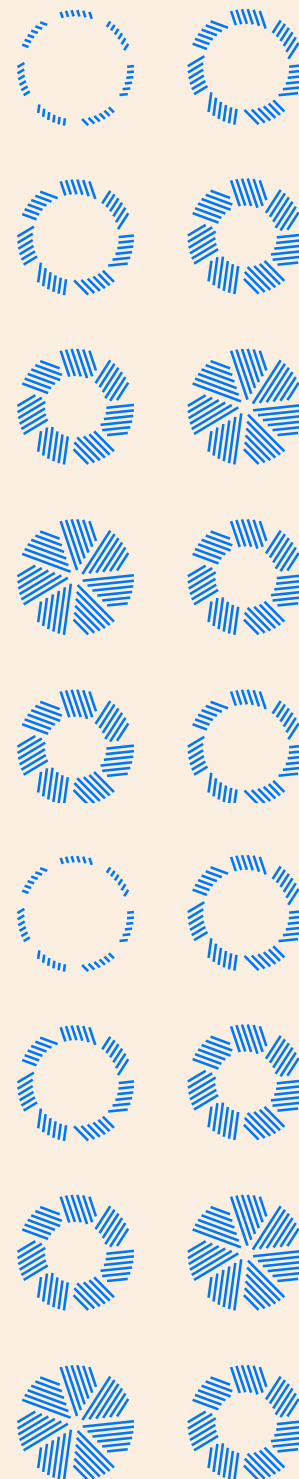
Jaclyn serves as Support Coordinator, where she works closely with the COO to support the Society's Financial Literacy Initiative and its ongoing impact within the community. She helps conduct surveys, maintain and update educational resources within the Society's member-only platform, Connect, and supports efforts that expand access to financial literacy programming and community engagement initiatives.

Strategic Partners

Collaboration and strategic partnership continued to play an important role in expanding the Society's impact across the investment and financial services community. Throughout the year, we worked alongside 18 respected organizations and industry partners to support initiatives focused on professional development, sustainable investing, diversity and inclusion, financial technology, leadership, and the advancement of women across finance and investment management. We are grateful to each of our strategic partners for their continued support, shared expertise, and collaborative spirit, and we look forward to building on these relationships in the years ahead.

Thank you to all of our partners:

Boston Economic Club (BEC)
Boston Estate Planning Council (BEPC)
Boston Fintech Sandbox
Boston Women in Finance (BWF)
Boston Women in Public Finance (WPF)
Chartered Alternative Investment Analysts (CAIA)
Collaborative WIM
Fidelity
Fintechwomenusa
Investment Diversity Advisory Council, Inc. (iDAC)
Institutional Investors
Kaplan Schweser
Massachusetts Society of CPAs
USSIF
Women in ETFs Boston (WETF)
Women in Investing; Networking & Supporting (WINS)
Women Investing in a Sustainable Economy (WISE)
Women's Initiative of Financial Planning Association of New England



Strategic Partners

Additional collaborative initiatives included participation in Boston Sustainable Investing Week and serving as the organizing Society for a Boston-based Bi-Annual Women's Networking Event, helping foster meaningful industry dialogue, professional connection, and community engagement across the investment community.

Throughout the year, we collaborated quarterly with fellow CFA Societies and CFA Institute to share ideas and strengthen cross-society engagement. These discussions focused on educational programming, sponsorship opportunities, member engagement, and best practices that support shared values, ethical leadership, and collaboration across the global CFA community.

Thank you to CFA Institute and the local Societies we worked with:

- CFA Society Atlanta
- CFA Society Hartford
- CFA Society Los Angeles
- CFA Society North Carolina
- CFA Society Providence
- CFA Society Toronto
- CFA Society UK

Celebrating 80 Years

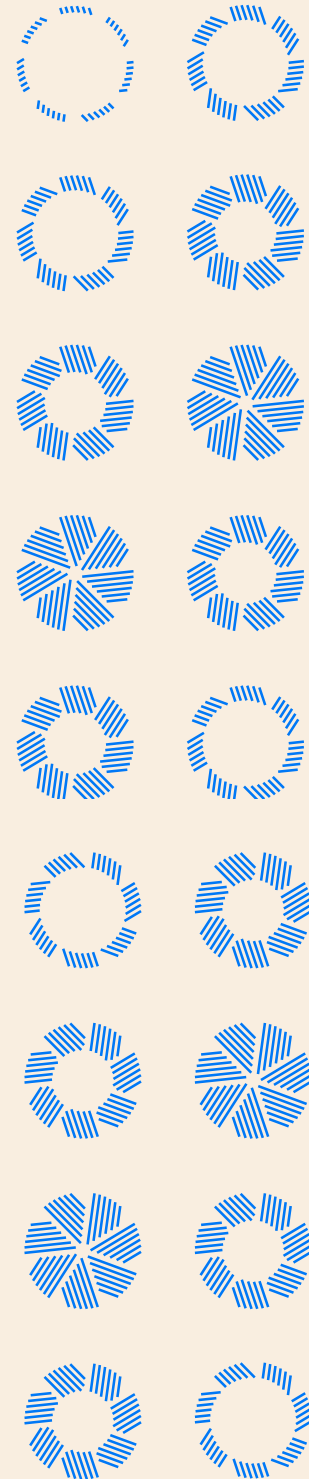
CELEBRATING 80 YEARS OF CFA SOCIETY BOSTON

This year marked an extraordinary milestone as we celebrated 80 years of CFA Society Boston and the lasting impact our community has made across the investment profession. Since our founding in 1946, the Society has served as a trusted professional home for generations of investment professionals committed to ethical leadership, professional excellence, and lifelong learning.

Over the past eight decades, the Society has evolved to meet the changing needs of both the industry and our members. What began as a professional network centered around investment analysis has grown into a dynamic organization supporting career development, candidate engagement, financial literacy initiatives, sustainable investing conversations, university outreach, volunteer leadership, and meaningful community connection.

At the heart of the Society has always been its people. Our members, volunteers, board leaders, sponsors, speakers, and partners have helped shape a collaborative and supportive community grounded in mentorship, shared values, and professional integrity.

As we celebrate this 80-year milestone, we are equally excited about the future. We remain committed to supporting our members through innovative programming, meaningful engagement opportunities, and a continued focus on ethics, leadership, and professional growth for generations to come.



Celebrating 80 Years



**CFA Society
Boston**

**80
Years**

Key Achievements

ADVANCING THE INVESTMENT COMMUNITY: CFA SOCIETY BOSTON IN NUMBERS

Celebrating connection, leadership, education, and impact across Greater Boston.

We are proud of the progress and momentum built throughout the year and grateful for the members, volunteers, partners, and community supporters who helped make it possible. These highlights reflect our continued commitment to professional excellence, meaningful engagement, and strengthening the investment community through education, leadership, and connection.

OUR VIBRANT COMMUNITY

6,203

TOTAL MEMBERS

459

NEW MEMBERS

143

VOLUNTEERS

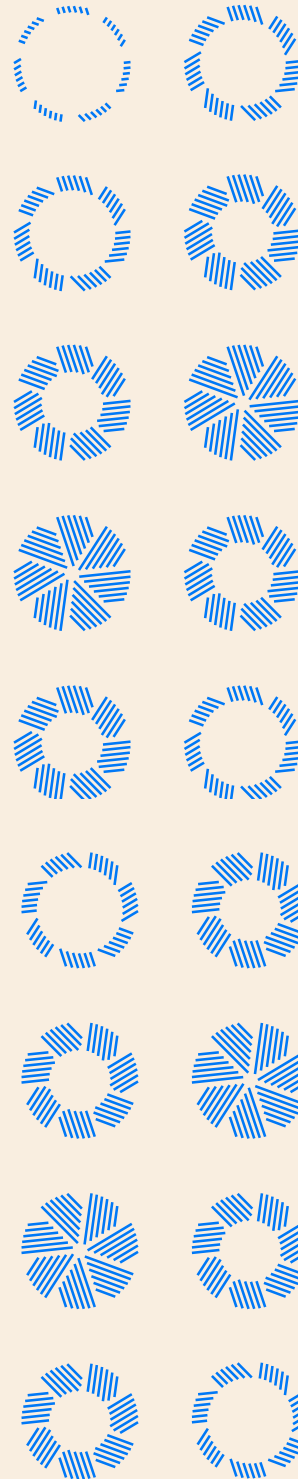
EDUCATION AND NETWORKING EVENTS

97

TOTAL EVENTS

3,245

TOTAL ATTENDEES



Key Achievements

GROWING THE NEXT GENERATION OF INVESTMENT PROFESSIONALS

68

STUDENT
MEMBERS

9

UNIVERSITY
COLLEGE PARTNERS

99

CANDIDATE
MEMBERS

STRATEGIC PARTNERSHIPS

4

CORPORATE
SPONSORS

4

SUSTAINABLE
INVESTING SPONSORS

55

MARKET DINNER
SPONSORS

18

ORGANIZATIONS

8

CFA SOCIETIES



**CFA Society
Boston**

80
Years

CFA Society Boston Headquarters
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Visit cfaboston.org for more information