

JUNE 2017 » VOLUNTEERS

# CELEBRATING CFA SOCIETY<sup>®</sup> VOLUNTEERS



It takes a special person to be a volunteer. Giving back to a community for the greater good involves commitment, passion, and integrity – attributes that over 1,600 CFA Society<sup>®</sup> leaders around the globe certainly display.

Through their work to promote the highest standards of ethics, education and professional excellence in the investment industry, CFA Society<sup>®</sup> volunteers develop new skills, strengthen existing knowledge, and build relationships with peers and local communities.

To recognize some of the most dedicated volunteers who are making a huge difference to the investment profession, CFA Institute annually presents the prestigious Volunteer of the Year Awards at the Society Leaders Conference. This year's ceremony took place in Philadelphia on 19 May 2017.

**We would like to thank all our volunteers for their selfless efforts and congratulate the following individuals for winning the 2017 awards.**

## Volunteer of the Year Award 2017 Winners

### Anthony Serhan, CFA, President, CFA Society Sydney

Anthony is an inspirational leader and has set a very high bar for the CFA Society Sydney board, which he joined more than six years ago. Under his leadership as president (since 2015), the society has created a sense of community among local CFA charterholders

and participant numbers at their events are at an all-time high. He is also passionate about increasing diversity and raising the number of female CFA charterholders. His board nominated him for this award due to his:

*“unwavering commitment and contribution to CFA Society Sydney and the broader CFA community in Australia.”*

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### **Bogdan Bilaus, CFA, President and board member, CFA Society Qatar, and advocacy chair, CFA Society Romania**

Bogdan’s commitment to volunteering is exceptional; not only has he been on the board of CFA Society Qatar since 2014 and its president since 2016, he has also been a board member of CFA Society Romania since 2007 and is currently their advocacy chair. The award application noted that Bogdan has:

*“Made the local societies of both Qatar and Romania the hubs of their respective investment communities and fostered international collaboration in the region.”*

Bogdan has helped revive CFA Society Qatar; increasing its membership, organising monthly events, and building strong relationships with local stakeholders. At CFA Society Romania, Bogdan initiated the Research Challenge, has run CFA Program presentations, and actively promotes market integrity. Bogdan builds inclusive societies, leads by example, and inspires others to get involved.

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### **Michael Frommelt, CFA, Past-president, CFA Society Liechtenstein**

Michael played a pivotal role in the establishment and development of the Liechtenstein Society of Investment Professionals in 2006. Through his hard work and dedication, CFA Society Liechtenstein became the 144th CFA Society® in 2014. His society explained:

*I believe it is no exaggeration to describe Michael as the founding father of all CFA related activities in Liechtenstein, and without whom, we would not have made the progress we have made today.*

In addition, Michael is a founding member of CFA Society Switzerland.

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### **Sophie Palmer, CFA, President, CFA Montréal**

Sophie has exceptional leadership skills and vision and has been president of CFA Montréal since 2015. She is results-oriented and the society has exceeded expectations on a number of objectives, including a 5% increase in society membership and increasing the member retention rate to 95.2%. Sophie’s award application noted:

*“Through her passion for our profession, drive and sense of ethics, she has brought the society’s brand awareness to a new level by spearheading social media, communication and media strategies, building and fostering new relationships with key employers and associations.”*

Sophie has also been a key contributor to the success of the Women in Investment Management initiative, which has gained tremendous momentum locally.

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### **Sam Huszczo, CFA, President, CFA Society Detroit**

Sam has volunteered at CFA Society Detroit for the past six years and makes it his mission to educate the region on the value of the CFA charter. The society said:

*“Sam has exhibited outstanding leadership and tireless effort in promoting ethical standards in the financial industry, growing and maintaining our membership.”*

To help promote the society, Sam has spent a huge amount of time building partnerships and has set up a strong presence on social media. He has been particularly successful in improving programming, with attendance of CFA Society Detroit events at over 64%. The Detroit Business Journal named him as one of the 30 business leaders in their 30s.

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### **David Smith, CFA, President, CFA Society Vancouver**

David has been a visionary volunteer at CFA Society Vancouver and is the first president to hold a two-year term in the society’s 50-year history. He inspires others and has successfully led the society through a period of extensive growth: society membership has grown by 15% (to 1,574 members); membership retention rates are at 94%; and attendance at events has increased, with the 2016 Forecast Dinner being one of the most profitable dinners to date. CFA Society Vancouver said:

*“He is dedicated to growing the CFA brand through the development of national initiatives, collaboration with other societies and working with CFA Institute.”*

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### **Ravi Abeysuriya, CFA, Outreach chair, CFA Society Sri Lanka - Lifetime Achievement**

*“Ravi is considered the father figure of the CFA Program in Sri Lanka”*

...noted his Lifetime Achievement award application. As the first CFA charterholder in the country, he is an inspirational role model who has raised awareness of the CFA Program among potential candidates and has built strong relationships with local employers. Ravi was the founder of CFA Society Sri Lanka in 2001 and led the society as president for five years. Not only did he steer the organisation, he encouraged others to give back to the profession and has remained a mentor to all subsequent presidents.

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### **Thomas Brigandi, CFA Society New York Asset Owner Series Founder and Lead Organizer, CFA Society New York, Inaugural Global Outstanding Young Leader**

Since becoming a member of CFA Society New York less than six years ago, Thomas has played a critical role in growing CFA Society New York membership. He has also organized 48 society events, which have been attended by over 8,500 investment professionals and over 325 speakers.

*“Tom’s efforts appear to have surpassed any prior benchmarks for any CFA Society New York volunteer”*

...said the society board. To recognize his dedication, the society awarded him their Benjamin Graham Distinguished Service Award in 2016, which placed him among the society’s most revered names in their 80-year history.

**Other notable volunteers include ...**



### **Justin King Howe Ong**

**Board of directors, CFA Society Malaysia**

Justin has demonstrated his exceptional leadership qualities by building strong relationships with universities, leading a dedicated team to launch the society's Career Day (which attracted over 1,000 participants and secured 24 sponsors) and producing the society's Quarterly Newsletter. Justin has motivated students to enroll for the exams and helped increase membership.



### **Eleanor Cheptoo Kigen, CFA**

**President, CFA Society East Africa**

Under Eleanor's expert leadership, CFA Society East Africa has established two offices (in Nairobi and Kampala), launched new society initiatives, and strengthened relationships with stakeholders in the region. She played a huge role in organizing the inaugural East African Investment Conference, which was a huge success, and the first African Advocacy Workshop and GIPS training session. Eleanor has been an inspiration to board members and society members alike.



### **Krzysztof Jajuga**

**President, CFA Society Poland**

As a founding member of CFA Society Poland, Krzysztof has contributed an enormous amount over his 13-year involvement. He has enhanced the position of the society, increased its ability to deliver services to its stakeholders, engaged many new volunteers, established important committees, and inspired board members to build strong partnerships. Krzysztof is an excellent role model for the Polish financial community.



### **Martin Fridson, CFA**

**CFA Society New York**

Having contributed to the finance profession and CFA Society New York for over 40 years, Martin has been committed to bringing transparency, education, and ethical standards to the industry. He has organized the High Yield Bond Conference, developed a one-day master class for high yield bonds, spoken at many conferences, and co-edited the book 'High Yield, Future Tense'.



### **Rani Piputri, CFA**

**CFA Board member, CFA Society Netherlands**

Rani has made an exceptional contribution to CFA Society Netherlands; helping to establish the society as the leading association of investment professionals locally. Rani has transformed the Annual Dinner from the largest loss making activity to a well-attended, self-financing event. She also initiated Women in Investment Management in the Netherlands and is a role model for many women in finance.



### **Sami Nabulsi, CFA**

**Founder, CFA Society Qatar**

Sami not only served as a board member and president of CFA Society Jordan in 2007-2008, he founded CFA Society Qatar in 2014 and served as president until 2016. He has been integral to the organization of the EMEA Regional Meeting in Jordan in 2008, the Middle East Investment Conference in Qatar in 2012, and raised significant funding for the society's advocacy outreach initiatives. Sami is an inspiration to others and encourages volunteers to participate in society initiatives.





## Shahidul Islam

President, CFA Society Bangladesh

Shahidul was a key driving force behind the formation of CFA Society Bangladesh and has played a critical role in establishing the society. He has shown an extraordinarily high level of commitment throughout: attending every local event, overseeing industry and university outreach initiatives, managing the society's part-time staff, and representing the society at events and in committees. Shahidul brings a strong and uncompromising work ethic to his volunteering.



## Thomas Mahoney, CFA

Board of governor, CFA Society Los Angeles

Thomas is an out-of-the-box thinker that does not shy away from big ideas or the work that they may entail. He launched the extraordinarily successful *ALTSLA Conference*, the premier alternative investments conference in Southern California; *First Wednesdays: The Wealth Management Excellence Series*, a series with diverse topics and great speakers and a *Wealth Management League* for those individuals who are most engaged. Thomas has undoubtedly raised the society's profile.



## Neil Withers, CFA

President, CFA Association Russia

Neil has contributed to the success of CFA Association Russia and has turned the society's board into a dedicated team of directors who take responsibility for the strategy and results of the society. To reach beyond Moscow, he launched a regional outreach program that has engaged stakeholders in the financial markets of Russia and the Commonwealth of Independent States. The weight and volume of support that Neil provides the society far exceed the levels expected of a volunteer.