

# EXECUTIVE POSITION PROFILE

## Chief Executive Officer

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**CFA Society  
New York**

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This search is being conducted by:

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# I. Opportunity

## CFA Society New York, a leader in innovation in the investment management industry, seeks new CEO.

CFA Society New York (CFANY) is seeking an empathetic, inspirational leader who is excited by our volunteer driven culture. The successful individual will be a strategic thinker with a data driven approach to planning and decision-making. Possessing a member-centric mindset, the new CEO should be a strong communicator and collaborator with an innovative and entrepreneurial approach. Most of all, the organization seeks an authentic leader with intellectual curiosity and a drive to succeed.



The new CEO will lead the organization's efforts in addressing the shift in how people want to consume content in an increasingly tech driven world – one that impacts the investment management industry as well as associations.

CFANY has a \$6+ million operating budget with 20 plus full and part time staff that serve 11,000 members with an office and event space in New York City's Times Square. It is one of the largest member societies of CFA Institute and a lead collaborator for other CFA Societies globally.

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## Primary Responsibilities

### Innovation and Vision

- Help develop and implement a strategic plan that further positions CFANY as an entrepreneurial and innovative organization.
- Ensure that the creativity and fresh perspective needed to succeed is evident in everything we do – from our conversations to our planning to execution.
- Continue to lead collaboration with other CFA Societies through the sharing of programming and best practices that allow each society to bring the realities of the profession to bear.
- Work closely with CFA Institute to develop the industry's future professionals and to raise the standards of professionalism in the investment management industry.
- Interact regularly and proactively with partner organizations to identify needs and opportunities for CFANY and to develop and implement business plans for each partnership.
- Implement strategy with the understanding of the economic, political and technological trends impacting CFANY and its members.
- Align staff and others behind a clearly articulated and compelling vision of organizational goals and objectives, leading to a steady stream of programs, products and services that members highly value.

## Governance and Management

- Ensure transparency in all aspects of the organization's decision-making and delivery of its activities.
- Develop and deliver a scorecard/dashboard that helps the Board and staff align for optimal organizational performance.
- Support the Board Chair in facilitating a culture of healthy governance through ongoing conversations with, as well as annual education for, the Board.
- Assure that CFANY always has a highly energetic and inclusive culture of communication and collaboration that allows it to become an employer of choice.
- Ensure robust processes and procedures are in place to support the work of the organization.
- Invest in the technology that supports the processes and work of the organization to ensure continuous excellence in service to members.
- Align financial systems and reporting with the forecasting and business modelling every organization needs in this environment and for the future.
- Develop and mentor staff at all levels of the organization through inspirational leadership.
- Guide a staff adapting to change as the organization transforms its approach to work as well as its delivery of content.

- Ensure the organization collects, analyzes and utilizes data to support all decision-making.
- Work closely and collaboratively with the Board to ensure the execution of the strategy, policies and procedures it develops and approves.

## Marketing, Membership and Programs

- Develop new, and deepen current, relationships and partnerships to advance the mission of the organization and the impact its members have.
- Inspire volunteer leaders to create, and staff to support the delivery of, best in class content for the investment management industry, including through a growing online platform.
- Oversee the development of marketing and communications strategies that highlight the organization while also telling the story of the profession it represents.
- Ensure that CFANY's programs meet and exceed member expectations.
- Turn the members creativity in developing content and programming into compelling delivery formats.
- Drive CFANY's member engagement strategies and activities.
- Champion CFANY members in ways that advance their professional status and the work of the profession.





## Measures of Success

Though specific KPIs will be developed between the Board and the newly hired executive, the following indicate the initial areas the KPIs likely will be built around:

- A new strategic plan has been finalized and annual business plans and a three-year budget have been implemented.
- The culture of the organization has been enhanced and CFANY is moving toward becoming an employer and organization of choice.
- The organization will have invested in, and enhanced its approach to, governance underscoring that CFANY is a volunteer driven organization that empowers staff to achieve results on behalf of the membership who are the ultimate customers of the organization.
- Our partnership with the CFA Institute remains strong and opportunities to increase our collective impact are continuously evaluated.
- Advanced degree or other professional designations desirable.
- 10 plus years of senior leadership experience.
- Experience working with a volunteer driven membership organization either as a volunteer leader or as a staff person.
- Proven ability to manage through transformation.
- An understanding of how to plan and leverage online and in-person events.
- A hands-on leadership style that ensures success in a smaller organization.
- Experience facilitating financial planning and forecasting during challenging times as well as during times of stability and of growth.
- A strong commitment to diversity and inclusion.
- Track record of developing and nurturing strategic relationships and partnerships.
- CFA Charter holder or experience with the profession preferred.

## Qualifications

The successful candidate should possess the following experiences and qualifications:

- A Bachelor's degree or equivalent education.

## II. Organization Review

### About CFANY

CFA Society New York is one of the largest of 160 member societies of CFA Institute. Its activity began in 1937, when value investing pioneer Benjamin Graham began organizing regular meetings of local security analysts. Throughout its history, the society has remained a volunteer-led, member-driven forum for the investment community with the broad, basic aims of: establishing and maintaining a high standard of professional ethics, improving analytical techniques, supporting the interchange of ideas and information among analysts, and promoting a proper public understanding of the function of security analysis and the operation of

the securities markets. CFA Society New York works in conjunction with CFA Institute to develop the industry's future professionals and to raise the standards of professionalism in the investment management industry.

### Web Presence

Web: [www.cfany.org](http://www.cfany.org)

Facebook: [@CFASocietyNY](https://www.facebook.com/CFASocietyNY)

Twitter: [@CFANewYork](https://twitter.com/CFANewYork)

LinkedIn: [cfa-society-new-york](https://www.linkedin.com/company/cfa-society-new-york)

Instagram: [CFASocietyNY](https://www.instagram.com/CFASocietyNY)

YouTube: [/channel/UCjTrUtdaoZOWAx4WJxj745w](https://www.youtube.com/channel/UCjTrUtdaoZOWAx4WJxj745w)

## III. About Vetted Solutions

**Vetted Solutions** is a Washington, D.C. based executive search firm specializing in association, nonprofit, and hospitality/destination marketing community, recruiting and consulting. We focus on senior staff and CEO positions. For confidential consideration, please email your resume and cover letter to [CFANYCEOsearch@vettedolutions.com](mailto:CFANYCEOsearch@vettedolutions.com) or contact Vetted Solutions at +1 202 544 4749.

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