

## **Ballot statement from Andrew Auslander, CFA**

I have been an active member of CFA Society New York since 2005 and have always enjoyed being involved in this volunteer-led organization which has its members' and the industry's best interests at heart.

It is currently my honor to serve on the Board of Directors of CFA Society New York. I have been its Treasurer since 2021. I am also Co-Chair of the Value Investing Thought Leadership group. I have accomplished the following for the CFA Society New York:

- Moved a sizable part of the operating funds that were not being utilized and in a zero-interest checking and set up a brokerage account to invest the funds in a prudent manner. That investment has yielded excellent returns for our future programming.
- Relocated the Facilities Fund into an interest-bearing fund out of a zero-interest account.
- Along with the CFA Society New York Finance Committee, updated the Investment Policy Statement that has cleared the way for a majority of the funds of the organization to be invested for the long term with better expected returns.
- Led the Real Estate Task Force for negotiating a new lease for the CFA Society New York space. We were able to negotiate a very competitive rent and have the landlord pay for \$1.8 million of improvements for our space.
- Improved our partnership with Fordham University's Gabelli Center for Global Security Analysis. The Gabelli Center is a frequent provider of sponsorship for CFA Society New York's events.
- Worked with CFA Society New York staff to hire a third party to rent out our conference space when it is not being used by the CFA Society New York.
- Managed the Benjamin Graham Value Investor Conference for the past three years. This is one of the marquee events of the CFA Society New York and attracts over 300 attendees each year.
- Managed many events for the CFA Society New York including the Annual Dinner / Celebration, several Labor transition events, Value Investing workshops and the How to Join a Board of Directors event in cooperation with the NACD.

I appreciate and have benefited from the world-class programming and great networking opportunities that the CFA Society New York provides. I believe my many years of experience working for both sell side and buy side organizations in trading and risk management enables me to continue to guide the CFA Society New York.

I will continue to solicit input from CFA Society New York members to shape the organization to meet the interests of its members. I will also continue the Board and staff's efforts to bring in unaffiliated CFA charterholders in the tri-state area and continue to partner with organizations to increase attendance and sponsorship.

Thank you for your support. Onward and upward.