

Ballot statement from Antonio Rodriguez, CFA

My name is Antonio Rodriguez, CFA, CIPM and I have been an active member of the CFA Society New York since 2015. I am most proud of my engagement with CFANY's Asset Owner Series, where I have been a participant and moderator on numerous panels, helped plan virtual and in-person events, and been awarded the society's Most Innovative Group in 2021. I have also worked on collaborations with various pension plans and the CFA Institute on programming. I believe my ability to cooperate and balance priorities makes me a qualified candidate for the board.

In my day job, I am the Director of Investments at the Building Service 32BJ Funds, a \$9 billion multiemployer pension and benefits fund serving commercial and residential building workers with members in New York, Massachusetts, Connecticut, and throughout the East Coast. Prior to my current role, I was the Director of Investment Strategy at the New York City Board of Education Retirement System. I have spent my career working directly on behalf of the ultimate beneficiaries of our financial system, investing in their retirement assets and advocating for their interests. I believe that I can bring that diversity of perspective to the CFA Society New York's Board of Directors.

To quote David Beatty, an expert on board governance, I view a board member's responsibilities through the lens of hindsight, oversight, and foresight. Hindsight involves understanding past decisions; drawing on the wisdom of previous board members, some of whom have served as mentors to me. Oversight entails ensuring the effective execution of the leadership team's program and vision. We have tremendous leadership, staff, and volunteers at CFA NY and making sure they get the resources necessary to fulfill their roles is paramount to the success of our society. Finally, foresight involves anticipating areas for future growth. I think that continuing to expand the outreach and communication to asset owners could be an integral part of CFA NY strategy moving forward.

If honored to be selected to the Board of the CFA Society New York, I pledge to bring the right level of involvement, support, and humility to the society's leadership.