



My name is Brian Morandi, and I am running for a position on the Nominations Committee. I believe that my path to becoming a CFA® Charterholder is unique and will contribute to the Nominations Committee and the CFA® Institute. My extensive experience in the financial services industry and my professional network, built over 40 years, have shaped my perspective and approach to success.

Over the course of my career, I've held a range of roles, from credit and structured product analyst to portfolio manager, client portfolio manager, and most recently, institutional investment consultant. I've navigated several market dislocations, experienced countless sleepless nights, and, through it all, learned the importance of listening to and aligning myself with individuals who demonstrate strong character. I've been fortunate to build lasting relationships with asset owners, sell-side professionals, and vendors, including administrators, attorneys, and investment platform representatives.

After earning my MBA from NYU 25 years ago, I realized that my career was still missing something. I had conversations with friends and colleagues about the CFA® program and ten years ago, at the age of 54, I became a CFA® Charterholder. I was one of the oldest candidates in the room during the exams, surrounded by younger candidates in college t-shirts and flip-flops. I did not know their motivations, but for me, the CFA® Charter was not a rite of passage or a career launchpad. Rather it was a way to introduce new methodologies to tackling challenges and to join a community committed to excellence. I've participated in past, attending discussion events while also being part of various working committees. I am looking forward to moderating the Credit Market Transformation Panel this coming January as my passion is to further strengthen that community.

I've always wanted to foster the success of others. Whether donating my time to teach portfolio construction, serving as a charity board member, or volunteering in my neighborhood, I've always sought ways to give back. In doing so, I have always been careful to listen and respect differing thoughts before making decisions that affect others. I believe that the people that I have met along my career, my broad perspectives given my diverse industry experience, and my passion will allow me to effectively assess Governor and Officer candidates who will continue to raise the intellectual bar, develop programs to meet with a changing environment, and provide strong guidance for the future of the Institute.