



Dear Members of CFA NYC,

I am excited to announce my candidacy for the Board of Governors of CFA Society New York. With over 25 years of experience in the investment industry, I bring a deep understanding of the challenges and opportunities faced by professionals in our field. My career spans leadership roles across both the buy-side and sell-side, with expertise in quantitative research, portfolio and risk management, macro research and innovation.

As a CFA Charterholder and Managing Director at Vedanta Analytics, I have successfully led global research teams, managed portfolios exceeding \$1.5 billion, and developed groundbreaking financial products. Notably, as Global Head of Quantitative Research at Credit Suisse, I pioneered the creation of the first 130/30 index in collaboration with MIT Sloan School of Management. These experiences have honed my leadership, strategic thinking, and ability to deliver actionable insights while upholding the highest ethical standards.

If elected, I will focus on three key priorities to enhance the value and impact of CFA NYC:

- 1. Educational Excellence:** Developing cutting-edge programs that bridge academic research with practical application, incorporating emerging technologies, and equipping members to stay at the forefront of the investment industry.
- 2. Diversity and Inclusion:** Advocating for increased representation and creating opportunities for underrepresented groups within the investment community.
- 3. Member Engagement:** Strengthening connections through innovative networking opportunities, fostering mentorship programs, and building stronger relationships between members and regulatory bodies.

CFA Society New York has played a pivotal role in shaping the investment profession, and I am passionate about contributing my skills, experience, and vision to its continued success. My technical expertise, leadership background, and unwavering commitment to ethical standards position me to make meaningful contributions to the Society's mission.

I am honored by the opportunity to give back to the CFA community that has been instrumental in my professional journey. Thank you for considering my candidacy. I look forward to the possibility of serving and collaborating with you to advance the goals of CFA NYC.

Sincerely,
Pankaj Patel, CFA