

**Ballot Statement from Ken Beitler, CFA
Candidate for the Nominations Committee**

Dear Members:

Thank you for considering my candidacy for the Nominations Committee of CFA Society New York.

I have been a member of the Society since earning my charter more than two decades ago, and during that time I have attended and participated in numerous Society events.

For most of my career, I have worked as an investment officer, allocator, and gatekeeper, managing investment portfolios and platforms in the insurance industry and for foundations. These portfolios spanned traditional and alternative asset classes and ranged in size from \$1.6 billion to \$85 billion. I am currently a founding member of a fintech startup focused on serving allocators.

As the largest society of the CFA Institute and located in the financial capital of the United States, CFANY plays a vital role in providing leadership and guidance to the investment management and financial services industry. In a period of rapid and unprecedented change, it is essential that CFANY continue to lead and advocate for its mission, vision, and—most importantly—its values.

As a member of the Nominations Committee, I would work to ensure that these principles remain central to CFANY's governance and Board activities. I believe my experience and perspective would allow me to contribute meaningfully in this role, and I respectfully ask for your support.

Thank you.