

Lisa Feit Candidate Summary
Nominations Committee CFANY

My name is Lisa Feit, CFA, CFP® and I would like to be on the Nominations Committee of the CFA Society of NY. I have been a member of CFANY for the past 11 years and had my CFA designation for the past seven years. I am heavily involved in the Women's Mentorship Program, both as a mentor and as a mentee. Additionally, I participate in many CFA Society events, both in person in NYC and virtually.

For the past 12 years, I have worked at The Glenmede Trust Company as a Relationship Manager, specializing in Portfolio Management. I work with ultra-high net worth multi-generational families to invest their liquid assets across all asset classes. In my role, I leverage many different aspects of the CFA curriculum, which allows me to connect with many other CFA charter holders who have more niche expertise.

I would like to be on the Nominations Committee to ensure that the CFANY Board best reflects the breadth and depth of the many CFA charter holders in NYC. CFANY members have many different areas of focus and the Society should be able to provide events and community for all of us. By having a Board with varied experience and expertise, we can work towards making CFANY an inviting organization for all involved. Additionally, I want to focus on bringing in the next generation of membership and creating ways for younger charter holders and members to get involved early on in their careers.