

Hello,

My name is Marion Balazard, CFA, and I am putting my name forward for the Nominations Committee of CFA Society New York. I have been involved with the Society since November 2023, and while I am a proud CFA charterholder, CFA Society New York has played a particularly meaningful role in my professional journey over the years. I was not born in the U.S., and when I first arrived, everything felt unfamiliar, both professionally and personally. CFA Society New York became one of the first places where I felt grounded, where I met people, I could learn from, exchange ideas with, and build meaningful professional relationships. That sense of belonging and professional home is a key reason why giving back to the Society matters to me.

As my involvement deepened, I became active across several groups, including alternatives and institutional roundtables, where I benefited from exposure to a wide range of perspectives across asset classes, career paths, and stages of professional development. More recently, I joined the leadership team of the Wealth Management group, contributing to the organization of meetings and in-person events. Through this work, I gained practical insight into how the Society operates, what drives sustained member engagement, and how thoughtful programming can create real and lasting value for the community.

Professionally, I bring over seven years of experience across the sell side, buy side, public markets, and private markets. I work closely with institutions and families to deliver investment solutions designed to preserve and grow long-term legacies across market cycles. This breadth of experience shapes how I think about leadership, accountability, and representation within the Society. It has reinforced the importance of recognizing different forms of leadership and ensuring that voices from across asset classes, member channels, and career stages are reflected in governance and decision-making.

This perspective is why I am seeking to serve on the Nominations Committee. If selected, my focus would be on helping build strong and diverse leadership pipelines, broadening representation across member channels, and supporting early- and mid-career professionals who are often looking for clearer pathways to become engaged and to lead. I am particularly interested in identifying leaders who combine technical excellence with sound judgment, integrity, collaboration, and a genuine commitment to serving the Society.

I would approach this role with care, independence of thought, and an appreciation for the responsibility the Committee holds in stewarding the Society's long-term leadership. I bring a collaborative mindset, strong follow-through, and a thoughtful, long-term approach to decision-making. It would be a privilege to contribute to the work of the Nominations Committee and to help support and shape the next chapter of CFA Society New York's leadership.

Sincerely,

Marion Balazard, CFA