



CFA Society of Sacramento

January 2010

UPCOMING EVENTS

Jan 14, 2010: Market Forecast Event; Sacramento State Alumni Center, 6000 J Street

Jan 15, 2010: CFA Institute Investment Research Challenge; Las Vegas, NV

CONTACT US

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Welcome New Charter-holders: CFASS holiday dinner

The CFA Society of Sacramento (CFASS) held its CFA Charter Award Ceremony and Holiday Dinner on December 9th at the Citizen Hotel to honor two individuals who earned their CFA designations this year. Over sixty individuals enjoyed dinner and drinks at the annual event. The venue offered spectacular views of Downtown Sacramento and the Capitol Building.

Candace Ronan, CFASS President, welcomed everyone and introduced board members in attendance as well as gave an update to the attendees on current and upcoming activities of the society such as the Market Forecast Dinner to be held in January, as well as CFASS's sponsorship of the Global Investment Research Challenge where students are offered a unique opportunity to learn from area investment experts and compete with peers from other top business schools.

Jason Bell, CFA Presidents Council Representative for the U.S. Western

Region, gave the keynote address. He discussed how the CFA charter is becoming more and more recognized as a worldwide standard of excellence. In fact, there are a greater majority of people outside the U.S. and Canada now taking the exam. He also discussed the importance of Charter-holders adhering to the highest of ethical conduct and standards.

Mr. Bell, Ms. Ronan, and Roy Clothier, membership chair of CFASS, recognized and presented charters to Denver Travis, CFA and Chris Calderon, CFA. Seven other society members also received their Charters this past year. These individuals were Ping Liu, CFA, Simon Lim, CFA, Richard Santos, CFA, Jonathan Welch, CFA, George Allen, CFA, Arthur Han, CFA and Jeffery Jaro, CFA.

Ms. Ronan then closed the ceremony thanking those in attendance and congratulating again the newly minted Charter-holders.



President's Message

Even though the office of President came to me unexpectedly, I am delighted to take the position and will do my best to provide clear, thoughtful and transparent leadership. We have much good work to do and I believe our volunteers are more than capable for the tasks that lie ahead.

As a beginning, we have launched a strategic plan. The goal of the plan is to focus the board on the events and programs that bring the most value to you, our members. We have restructured the board so that the executive committee, composed of the past president, president, vice president, secretary and treasurer, provides strategic guidance to the broader board. A specific chairperson is now tasked with the responsibility for each event or program.

In addition, Dan Bienvenue has graciously agreed to serve in the capacity of Vice President of the Society. Dan's long association with the Society makes him the perfect person for the job. His insight and experience will be invaluable to us as we move forward. Our secretary, Hao Lin, and his committee are also working on amended bylaws, which will be presented to you, our members, later this fiscal year. Our most recently added chairperson, Lara Luo, is leading the effort on the monthly newsletter, keeping members posted on big events within the society.

The next event, our Market Forecast will be on January 14th, at California State University, Sacramento once again and will be jointly presented by our colleagues at the Sacramento Business Review. Please save the date and join us.

Candace Ronan

The Technology Committee, co chaired by Jon Welch/Orintheo Swanigan, is in the midst of updating our website. One of the major goals is to provide members and candidates a user-friendly website that will serve as an excellent resource for everything from upcoming events to study groups. In addition, we are pleased to announce the launch of the CFASS Facebook page. Here you can find out about upcoming events, start discussions, even set up your own CFA related events. Candidates can ask questions or set up study groups and members of the group can organize a social event at a local restaurant or tavern. We hope that members and candidates will use the CFASS Facebook page as a platform to network with other professionals in the area and facilitate the growth of the CFA community in Sacramento.

CFASS Board of Directors and Committee Structure

President	Candace Ronan, CFA
Past President	Geraldine Jimenez, CFA
Vice President	Dan Bienvenue, CFA
Secretary	Hao Lin, CFA
Treasurer	Jonathan Lederer, CFA
Director	Sharyl David, CFA
Director	Teresa Cutter
Program	Jane Delfendahl, CFA
Membership	Roy Clothier, CFA
Annual Meeting	Roy Clothier, CFA
Education	Denver Travis, CFA/Brian Leu, CFA
Technology	Jonathan Welch, CFA/Orintheo Swanigan
Marketing	Darrin Dennings
Investment Research Challenge	Brian Leu, CFA
Golf Tournament	Denver Travis, CFA
Market Forecast	Jonathan Lederer, CFA

The Marketing Committee, was assembled with intentions of understanding its reach within the local community. From the Market Forecast Dinner to the Golf Tournament, the Committee took a broad look at all of the Societies events. Formed with board members Candace Ronan, Lara Luo, Brian Leu, Roy Clothier and Darrin Dennings, the Committee walked away with a comprehensive understanding of CFASS's intrinsic values. Currently, the Marketing Committee is fostering its local presence and looks to expand its network across the West Coast with the support of the Investment Research Challenge.

Investment Research Challenge (IRC): CFASS is fielding a Sacramento based team in the regional CFA Institute Investment Research Challenge on January 15 in Las Vegas. The team is comprised of four graduate students from University of California at Davis and mentored by Brian Leu. The professor working with the students is Joseph Chen. The team is performing a full company analysis of locally based telecom company Surewest.

