



CFA Society San Francisco Background Information

History

With its origin dating back to March 1929, CFA Society San Francisco is the second-oldest and one of the largest of the 150+ global CFA societies, representing the membership arm of the prestigious CFA Institute – issuer of the Chartered Financial Analyst designation. The Society serves more than 3,200 Bay Area members, candidates, and investment professionals through professional learning programs, career development resources, and community-building opportunities.

Our Mission

CFA Society San Francisco's mission is to advance Bay Area investment professionals through education, career development, and community building.

Our Vision

CFA Society San Francisco's vision is to better investment outcomes for the Society at large.

Organization

CFA Society San Francisco is a 501(c)(6) nonprofit membership association governed by an elected volunteer Board. The Board's Executive Committee includes the President, Vice President, Secretary, and Treasurer. The immediate Past President and two to ten Directors-at-Large complete the Board.

The Society is supported by professional staff and led by a Chief Executive Officer who oversees day-to-day operations to deliver on the mission of the organization.

Membership

There are 3,200 members of the Society in five categories: Regular, Affiliate, Industry, Candidate, and Student.

Financials

The Society operates with an annual budget approximately \$1,000,000 and maintains assets of approximately \$1,300,000. The fiscal year is July 1 – June 30. Financial statements are reviewed annually by an independent accounting firm.

As a 501(c)(6) non-profit mutual benefit corporation, dues and event fees are generally not deductible as charitable contributions but may be deductible as business expenses.

Board Meetings

The Board meets approximately eight times per year in-person and via Zoom. Board members also serve on committees, which set their own regularly scheduled meetings.

Code of Ethics

CFA Society San Francisco adheres to the CFA Institute Code of Ethics and Standards of Professional Conduct, which all members, volunteers, and staff are required to accept and comply with.



Expectations for Board Directors

All Board Directors contribute to creating the mission and vision of the Society and setting strategic direction for the future. Directors are expected to support members, Society activities, and Society staff.

Basic responsibilities expected of Board directors are as follows:

- Preparing for, attending, and actively participating in Board meetings and Society events.
- Collaborating with fellow Directors and the Chief Executive Officer to guide strategic direction and support key initiatives
- Serving on Board committees
- Serving as an active advocate and ambassador for the Society and representing Society leadership at CFA Society San Francisco programs and other industry events
- Identifying, building, and maintaining strategic partnerships necessary for the Society to advance its mission
- Reviewing and approving the annual budget and other major Board actions
- Participating in the evaluation of the Chief Executive Officer
- Engaging and collaborating with CFA Institute and other Western Region CFA Societies

Board Tenure

Board members are elected to two-year terms and may serve for three consecutive terms, not including any years served on the Executive Committee.

Selection Process

Directors are nominated by the Nominations Committee which includes the sitting President, the immediate Past President (Committee Chair), and an additional Past President. The Committee's objective is to build a dedicated and diverse Board that effectively guides the Society's long-term strategy. Factors considered in selecting Directors may include professional background, experience, skill set, and needs of the Board.

This year, the Board has identified the following preferred – but not required – applicant experiences and skills:

- **Demonstrated interest to non-profit volunteerism**
- **Past or current professional experience with:**
 - Local Technology Organizations
 - Private Wealth Management Firms
 - Corporate and Government Treasury
 - Bay Area Universities

The Nominations Committee accepts applications in February and March, reviewing submissions and conducting interviews via Zoom in April. A background check may be performed for nominated candidates. Applicants selected to move forward will be presented to the Regular Members for voting in May and June. Final appointments for the 2026–2027 fiscal year will be announced and the new Board is installed on July 1.

Application Window

Applications may be submitted February 26 - March 31 with the deadline for consideration closing on March 31.

Apply using the URL below:

https://bit.ly/CFA_BOD26