



On February 13th through the 15th, CFA Societies Texas collaborated with Louisiana and Oklahoma societies along with the CFA Society Dallas Fort Worth to put on the three day Texas CFA Investor Summit. Open to 3,000 charterholders, investment professionals, academics and students in the Southwest U.S. and Central America, **this first inaugural summit sold out!** The Summit included a CFA-DFW Forecast Dinner on Thursday evening featuring Jim Grant, Bill Miller, CFA and Shad Rowe with Kathleen Hays moderating. On Friday, the full day Texas Investor Symposium took place on the SMU campus with key speakers including Kyle Bass, Joshua Chisari, Ronald Florance, CFA, Dr. Lacy Hunt, John Olson, John Rogers, CFA and Dr. Harvey Rosenblum. And on Saturday at SMU, the Southwest US and the Central America and Caribbean CFA Research Challenges were held in conjunction with TIPS (Texas Investor Portfolio Symposium). Between the three days, over 1,000 individuals gathered to participate in one or more of these events.

Due to the success of this summit, CFA Societies Texas has been working with the Institute to put together a “How to” guide to assist other societies that might wish to replicate this experience with a symposium of their own. We presented the results of our symposium at the America’s Society Leader Regional meeting on April 3 – 5 and a copy of this guide along with our program and other key information will be made available on the Society Resource Center pages of CFA Institute’s website. **Plans are already in the works to offer this Texas Investor Symposium in future years at key venues around the state: Houston is already preparing for the second inaugural Texas Investor Symposium so “Stay Tuned”.**

We want to recognize all of the key volunteers from the 4 CFA Societies Texas plus those from CFA Society Louisiana and CFA Society Oklahoma. It truly was a collaborative effort.

Strong volunteer enthusiasm and support made the Summit such a success.



TEXAS INVESTMENT PORTFOLIO SYMPOSIUM (TIPS) & CFA RESEARCH CHALLENGE – SOUTHWEST U.S.

This year 24 university teams from the 3 states competed in the Southwest U.S. Research Challenge writing an analysis/research report on Solar Winds (SWI). On February 15th, the 8 finalist teams/schools for the Challenge were announced: Nicholls State University, Rice University, Texas Tech University, Texas Woman’s University, Tulane University, University of North Texas, University of Texas at Dallas, and West Texas A&M University. The Finals were held at Southern Methodist University in conjunction with the inaugural Texas Investment Summit on 15 February 2014 at TIPS (Texas Investment Portfolio Symposium). **This year’s winner is Rice University, with Nicholls State University coming in 2nd!** Both teams went on to represent our local Challenge competing against 46 other schools at the Americas Regional in Denver, CO on March 19th. This year finals winner for the Americas is the **University of Missouri - Kansas City**. They will go on to the Global Research Challenge Finals in Singapore competing against the winners of the EMEA and Asia Pacific regions. More information about the Challenge can be found at www.cfainstitute.org under the Community, Research Challenge tab. Information for our own Southwest U.S. challenge can be found at www.cfasocietiesoftexas.org under the Research Challenge tab.

And once again, we wish to offer a special thanks to the 100 plus volunteers from the 4 CFA Societies Texas plus those from CFA Society Louisiana and CFA Society Oklahoma. All the faculty advisors, society liaisons, industry mentors, research report graders and presentation judges contributed both their time and their expertise to the success of this, our 9th Southwest U.S. Research Challenge. To get involved, contact Sharon.Criswell@yahoo.com

CFA Societies Texas - Who We Are

CFA Societies Texas is a collaboration of the four Texas CFA Societies, and it is a platform to better serve our members by:

- Providing a centralized communications platform
- Fostering innovative and collaborative programming
- Supporting member career development
- Increasing brand awareness and advocacy

Mission

To better serve the four independent Texas CFA societies through communication, administration, and collaboration.

About CFA Societies Texas

This initiative started in April 2010, where leaders of the local societies agreed to explore the benefits of working together to more efficiently deliver services and benefits to the local societies.

The model is based on the prior success working together regionally on the CFA Institute Investment Research Challenge started in 2006.

Pillars (Objectives)

CFA Societies Texas will serve the four Texas societies by focusing on key issues of regional importance.

- Programs – promote reciprocity, speaker sharing, virtual programs, and a multi-year Texas Investment Symposium
- Career – employer outreach, a Texas job bank, Southwest U.S. Research Challenge, and university relations
- Advocacy/Communications – speaking with one voice and advocating for members with employers, regulators and legislators
- Public Awareness – raising our regional profile, branding, outreach to media, and sponsorship opportunities

Membership Information

CFA Societies Texas member societies of Austin, Dallas-Fort Worth, Houston and San Antonio's total membership includes:

Austin	363
Dallas-Fort Worth	1,172
Houston	873
San Antonio	<u>199</u>
Total:	2,607

Website

To learn more about CFA Societies Texas, programs and career opportunities open to all members of the four Texas societies and/or to get involved, please visit our website at www.cfasocietiestexas.org.