



Kansas City CFA Society

ANNUAL REPORT
2009-2010

Kansas City CFA Society Annual Report 2009-2010

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Administrative Office
Kansas City CFA Society
330 Wenneker Drive, St. Louis, MO 63124

2009 – 2010 Officers, Board of Directors, and Standing Committees

Officers

President	Jonathan Bauman, CFA
Vice President/Education	Christopher Bouffard, CFA
Treasurer	Michael Fogarty, CFA
Secretary/Public Awareness	Laurian C. Lytle, CFA

Board of Directors

Immediate Past President	K.C. Mathews, CFA
Programs	Stuart Berkerly, CFA Michael White, CFA
Membership	Scott Ward, CFA

Committees

Golf Committee	Timm P. Bechter, CFA
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President's Report 2009-2010

By Jonathan Bauman, CFA

The 2010 fiscal year for the Kansas City CFA Society was comprised of a continuation of successful events and programs from prior years, coupled with some new ideas that will enhance and potentially expand membership in the future. I want to thank everyone on the Society's Board of Directors for their dedication and commitment to the success of our local Society.

Programs and continuing education are the primary goals of the Society. Each year we seek to improve upon the quality and diversity of topics in the programs that we offer to our members. As usual, we kicked the year off with a presentation by Dr. Thomas Hoenig, President of the Kansas City Federal Reserve Bank. Additionally, we had speakers throughout the year covering a timely list of topics from health care reform, to the outlook for credit markets to forensic accounting. Additionally, we hosted social events to allow our members to network and share ideas with their peers. For a complete list of programs, please see the program summary page.

We also continued to raise awareness of the CFA designation and our profession through our annual CFA Charter recognition ceremony, our post-CFA exam party, presentations to regional universities and the second annual CIO Investment Forum. See the report from Chris Bouffard, CFA, Vice President/Education Chair, for additional details.

In addition to the robust programs offered during the year, we also undertook a few new initiatives, primarily in the areas of student outreach and member engagement:

- In September we hosted our first ever University Outreach event where we invited students from regional universities to learn more about the CFA Program. The students were able to hear presentations from Robert McLean, Ph.D., CFA, Head of University Relations from the CFA Institute and Melissa Watkins, Director of Recruiting and Consulting for OMNI Employment Management Services, and talk to members of the Board of Directors.
- In October we sent out a survey to our membership, something that had not been done in a number of years. Thank you to those of you that took the time to respond. The results of this survey were sent out to members in February, but are also included in this report. We always welcome your comments and suggestions on ways we may improve the value of your Kansas City CFA Society membership.
- We purchased technology to enable us to webcast future programs so our members outside the Kansas City metro area or those that can't leave their office to attend in person will be able to participate in many of our educational programs.

The Society's financial strength remains strong, thanks in part to the continued popularity of our Annual Golf Tournament. Timm Bechter, CFA, our Golf Tournament Chair, has done a great job of obtaining sponsors and ensuring the tournament runs smoothly.

One of our financial goals, a guideline from the CFA Institute, is to maintain two years of expenses in reserves. We feel we are adequately reserved and expect to use excess funds to bring interesting presentations to our membership in the upcoming fiscal year. See the Treasurer's report from Michael Fogarty, CFA for additional details on our financial position.

We made a decision last year to spend our advertising dollars as of sponsor of the Kansas City Marathon, which included sponsoring several teams in the race. We also placed an ad in the Kansas City Star recognizing new Charterholders. See the Public Awareness Report from Secretary Laurian Lytle, CFA for more information.

The Society's membership remained steady in 2010 fiscal year and stands at 425. Kansas City remains one of the largest societies in the Midwest Region.

Joan Hecker, Executive Director, continues to be our sole paid administrator. She has done a great job of managing the daily administrative needs of the Society. Her efforts allow us, as a volunteer Board of Directors, to be more effective.

I have enjoyed the opportunity to serve the Society over the last six years and feel we have a very solid Board of Directors to lead us into the future. We are constantly looking to improve the Society's value proposition to its members and always appreciate your comments and suggestions.

Vice President's Report 2009-2010

By Christopher M. Bouffard, CFA

During fiscal year 2010, the Kansas City CFA Society continued its efforts to raise awareness of the Society, the CFA Institute, and our membership. In this regard the Society continued traditional awareness events and began several new initiatives that I would like to highlight.

In September the Society held our first-ever University Outreach Event, and by all accounts it was a success. For the event we brought together students from several regional universities, representatives from the CFA Institute and Stalla CFA Exam preparation, as well as several members of the KC-CFA Society board to discuss financial careers and the CFA Program with the students. Again, the response from the students and professors of the participating universities was overwhelmingly positive. We have shared our experience with other CFA societies looking to hold similar events and have also received some excellent suggestions for improving and expanding on the event in the upcoming years.

In November, the Society hosted its annual Charter Recognition Event in which we welcome and honor our new CFA Charterholders and CFA Program Graduates (those who have successfully passed the three levels of the exam and waiting to attain sufficient work experience). The CFA Award Dinner was held at Starker's Restaurant on the Country Club Plaza. As is customary, Charterholders were encouraged to invite their spouses and employers. This is a terrific event that enjoys broad participation and provides an opportunity to increase awareness of the CFA designation and our Society among local employers. We had a group of 25 attend the event.

In continuing the support of our mission, and heighten awareness of the CFA designation and the Society, Board members made presentations to the University of Kansas, Kansas State University, the University of Central Missouri, and the University of Missouri.

We concluded our fiscal year with our annual CFA Post-Exam Party on the Plaza. Despite decreasing exam registrations in the last two years, the last two post-exam events have been the two best attended in our history. The KC-CFA Society partners with Stalla/Becker Professional Education (a CFA preparation provider) to host the event, which gives board members a chance to meet new potential Society members.

Finally, the foundation has been laid for another new education/outreach event in Fiscal 2011. The Society secured funding from the CFA Institute to conduct our first Global Investment Research Challenge (IRC). The IRC is an equity research competition that offers students in the region the opportunity to learn from industry experts and practitioners in the area. The Society partners with local universities to assemble teams of 3-5 students that in turn are mentored by industry professionals by writing an equity research report on a locally based publicly traded company. The teams then present their findings to a panel of experts. The Kansas City challenges will be held in the fall and winners will progress to the Regional Finals in early Spring, with the Global final to held in April. Look for more information on the Global Investment Research Challenge on our website at www.kc-cfasociety.org.

Treasurer's Report 2009-2010

By Michael P. Fogarty, CFA

The Society continues to be in sound financial condition after completing another fiscally successful year. The society's annual golf tournament remains an important contributor to our strong financial performance. We would again like to thank all of the sponsors and participants that make the event such a success. Improved revenues and equity have allowed us to expand the breadth and frequency of society events during the past year. Additionally the society has committed to use our strong financial position in furthering our efforts to develop our local investment community in the coming years.

There are several highlights of the financial statements that can be offered:

The Society's gross revenues for the fiscal year were \$112,312, which included just over \$25,000 in financial support from the CFA Institute. The Golf Tournament contributed nearly \$43,000 to revenues and over \$34,000 of Membership Dues was received.

Expenses during FY10 totaled approximately \$83,000, which included \$21,000 for Program Expenses, \$19,500 for the Golf Tournament, and \$5,000 to promote the Society at the Kansas City Marathon. The Society also purchased, at a cost of \$6,000, the hardware and software necessary to webcast certain continuing education programs beginning in the 2010-2011 fiscal year. Overall, the Society had positive cash flow of \$29,517 during FY10.

The Society's balance sheet remains very healthy, closing the year with approximately \$185,000 in reserves. The board is dedicated to sustaining the financial and operational flexibility that allows us to engage in activities that add of value to our members, candidates, and the Kansas City region's investment community. A balance sheet statement as well as a profit & loss statement is presented on the following pages.

Kansas City CFA Society

Balance Sheet

As of June 30, 2010

	Total
ASSETS	
Current Assets	
Cash and equivalents	
Intererst-bearing current account	94,543
Certificates of deposit	90,323
Total cash and equivalents	184,866
Total Accounts Receivable	-
Total Other Current Assets	-
Total Current Assets	184,866
TOTAL ASSETS	184,866
LIABILITIES AND EQUITY	
Total Liabilities	-
Equity	
Opening equity balance	155,349
Net Income	29,517
Total Equity	184,866
TOTAL LIABILITIES AND EQUITY	\$ 184,866

Kansas City CFA Society

Profit & Loss

July 2009 - June 2010

	Total
Income	
Membership Dues	34,465
CEP Continuing Education Programs	9,172
CFA Institute funding	25,003
Total Interest Income	176
Total Miscellaneous Income	810
Golf tournament	42,686
Total Revenues	\$ 112,312
 Expenses	
Administration Expenses	13,200
Bank Fees	100
Other Administrative	607
Other Postage	123
Professional Services	769
Storage	165
Telecommunications	1,311
Audio-Visual hardware/software	6,155
Total Administration Expenses	22,431
SD Society Development	
Audio/Visual	177
Food/Beverage	17,114
Miscellaneous	1,072
Promotion	2,802
Society Outreach	8,227
Sponsorship/Public Relations	5,180
Travel	3,746
Total SD Society Development	38,317
SP Social Programs	
Golf	19,559
Happy Hours	2,011
Promotion	477
Total SP Social Programs	22,047
Total Expenses	82,795
Net Income	29,517

Public Awareness Report 2009-2010

By Laurian Lytle, CFA

During fiscal year 2010, the Kansas City CFA Society continued its efforts to increase awareness of our Society, the CFA Institute, and our membership. While the intent of our public awareness activities is not necessarily to elicit a buying response, as most advertisements do, the board continues to feel that the media exposure increases awareness of the CFA brand. It is the board's belief that this serves Charterholders and Kansas City CFA Society members through better recognition by the investing public of the CFA designation and the high level of achievement and commitment to ethical business practices it represents.

As in past years, in November 2009 the Society recognized new CFA Charterholders through an advertisement in the Kansas City Star. Beginning last year we included individuals who passed Level III of the exam but did not yet have the full experience requirements to be awarded the CFA Charter. In recent years the required work experience period has increased and the scope of qualified work experience has narrowed. As a result, we have seen an increase in candidates who have successfully passed all three levels of the exam but do not have sufficient work experience to be Charterholders. The board continues to feel it is important to publicly recognize the accomplishments of all individuals who successfully completed the CFA exam program.

In addition, the Board decided to participate in the 2011 Global Investment Research Challenge, sponsored by the CFA Institute, by holding a local investment challenge beginning in the fall of 2010 and culminating with the oral presentation competition in February 2011 between teams from the University of Kansas, Kansas State University, the University of Missouri at Kansas City, the University of Missouri, and Central Missouri University. Participating in the Investment Research Challenge will help promote awareness of our local society, and CFA Institute and the CFA Program to university students and faculty and to the general public through a series of public announcements about the Investment Challenge.

In May of 2010, the Society held an Investment Forum in which several of Kansas City's leading investment professionals shared their thoughts in a panel discussion of current investment topics. In order to address our mission of enhancing the Society's profile and awareness of the CFA brand, this event was open to the investing public. Invitations were sent to members encouraging them to bring their clients and guests.

The board decided to sponsor the Finish Line Stage/Awards Ceremony of the Kansas City Marathon in October 2009 instead of advertising in the Kansas City Symphony Playbills. An exciting byproduct of this sponsorship is Society members' active involvement in the event. The sponsorship package includes several race entries for the marathon, the half-marathon, and a couple of five-person marathon relay teams. Post the event, we received feedback from members that indicated they did not see the booth or signs set up for the purpose of increasing public awareness of the Kansas City CFA Society. Thus the Board decided not to continue this sponsorship of the 2010 Kansas City Marathon.

The Board explored several alternatives and determined using public radio advertising spots during the morning and evening financial shows would reach our target audience of investors and promote more awareness of the Kansas City CFA Society as well as the CFA Institute. Radio spots will be developed with the help of KCUR, using spots developed by other local societies. These ads will be run and concentrated primarily in 1Q 2011 as most investors and investment advisors are at the height of tax and investment planning during this period.

Finally, we have continued our attempts to increase awareness of the benefits of the CFA Charter, the CFA Institute, and the Kansas City CFA Society with future investors and investment professionals by continuing our outreach to regional university business programs with scholarship assistance as well as subsidized study materials through our partnership with the Stalla CFA review program.

Program Summary Kansas City CFA Society 2009-2010

October 26, 2009: Reception and talk 4:00 p.m. KC CFA Federal Reserve

December 3, 2009: Outlook for the US and global economies... Speaker: Nancy Lazar

January 7, 2010: Social Gathering at McCormick & Schmick's

January 13, 2010: Health Care Reform. Speaker: Damien Conover, CFA

February 16, 2010: Pilgrimage to Warren Buffett's Omaha. Speaker: Jeff Matthews

March 10, 2010: Update and Outlook for the Credit Markets. Speaker: John Tousley is a VP with the Third Party Portfolio Strategy Group of Goldman Sachs Asset Management in New York.

April 29, 2010: Outlook for Credit Markets and Financial Services Industry.
Speaker: David Hendler

May 6, 2010: 2nd Annual Investment Forum

Panelists:

Enrique Chang, CIO, American Century

Hank Hermann, CEO, Waddell & Reed

Jim Moffett, Chief International Strategist, UMB

Joe Williams, Chief Equity Strategist, Commerce Bank

Gary Cloud, CO-CIO Fixed Income, Financial Counselors Inc.

May 13, 2010: Financial Shenanigans: How to Detect Accounting Gimmicks and Fraud in Financial Reports. Speaker: Howard Shilto

June 10, 2010: Annual Meeting 4:30 p.m. / Happy Hour 5:00 – 7:00 p.m.

June 28, 2010: Annual Golf Tournament



Society Demographic Profile Report
for Kansas City CFA Society

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Society Name
Kansas City CFA Society
Society Region
Midwestern US

Total Active Members in Society: 425

Total Completed Professional Profiles: 412

Percentage of Completed Professional Profiles: 96.9%

Total Unaffiliated Members in Society Area: 84

Total Active Members in Society Region: 9,278

Charterholder

Charterholder	Active Members	% of Total	Unaffiliated Members	% of Total	Society Region	% of Total
Charterholder	354	83.3%	82	97.6%	8,056	86.8%
Non-Charterholder	71	16.7%	2	2.4%	1,222	13.2%
Total	425		84		9,278	

Gender

Gender	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Female	42	13.4%	6	8.8%	1,028	14.8%
Male	272	86.6%	62	91.2%	5,934	85.2%
Subtotal / % of Total	314	73.9%	68	81.0%	6,962	75.0%
No Data	111	100.0%	16	100.0%	2,316	100.0%
Subtotal / % of Total	111	26.1%	16	19.0%	2,316	25.0%
Total	425		84		9,278	

Age Range

Age Range	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
21 - 25	3	0.7%	0	0.0%	44	0.5%
26 - 30	18	4.5%	1	1.2%	797	9.0%
31 - 35	78	19.4%	5	6.2%	1,509	17.1%
36 - 40	76	18.9%	11	13.6%	1,713	19.4%
41 - 45	58	14.4%	18	22.2%	1,560	17.7%
46 - 50	67	16.6%	14	17.3%	1,284	14.6%
51 - 55	46	11.4%	17	21.0%	871	9.9%
56 - 60	34	8.4%	6	7.4%	476	5.4%
61 - 65	10	2.5%	5	6.2%	284	3.2%
> 65	13	3.2%	4	4.9%	272	3.1%
Subtotal / % of Total	403	94.8%	81	96.4%	8,810	95.0%
No Data	22	100.0%	3	100.0%	468	100.0%

Age Range	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Subtotal / % of Total	22	5.2%	3	3.6%	468	5.0%
Total	425		84		9,278	

Educational Degrees Held

Degree	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
In Progress	0	0.0%	0	0.0%	4	0.1%
Bachelors or equivalent	203	58.0%	34	42.0%	4,531	58.1%
Masters or equivalent	151	43.1%	44	54.3%	3,452	44.2%
MBA	24	6.9%	7	8.6%	671	8.6%
Doctorate - PhD, EdD or equiv.	4	1.1%	4	4.9%	140	1.8%
JD	8	2.3%	0	0.0%	107	1.4%
MD	0	0.0%	0	0.0%	2	0.0%
Subtotal / % of Total	350	82.4%	81	96.4%	7,803	84.1%
Total	425		84		9,278	

Years in Industry

What year did you start working in the investment industry?

Years in Industry	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Not Applicable	10	2.4%	2	2.7%	244	2.8%
5 years or less	29	7.0%	1	1.4%	653	7.4%
6 to 10 years	69	16.7%	9	12.3%	1,755	19.9%
11 to 15 years	91	22.1%	11	15.1%	1,959	22.2%
16 to 20 years	55	13.3%	16	21.9%	1,472	16.7%
Over 20 years	158	38.3%	34	46.6%	2,751	31.1%
Subtotal / % of Total	412	96.9%	73	86.9%	8,834	95.2%
No Data	13	100.0%	11	100.0%	444	100.0%
Subtotal / % of Total	13	3.1%	11	13.1%	444	4.8%
Total	425		84		9,278	

Employment Status

What is your current employment status?

Employment Status	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Full-Time	390	94.7%	59	81.9%	8,183	92.6%
Part-Time	4	1.0%	1	1.4%	116	1.3%
Student	1	0.2%	0	0.0%	36	0.4%
Unemployed	8	1.9%	4	5.6%	304	3.4%
Retired	9	2.2%	8	11.1%	196	2.2%
Subtotal / % of Total	412	96.9%	72	85.7%	8,835	95.2%
No Data	13	100.0%	12	100.0%	443	100.0%
Subtotal / % of Total	13	3.1%	12	14.3%	443	4.8%
Total	425		84		9,278	

Assets Under Management

If applicable, please select the level of your firm's Assets Under Management.

AUM (in \$USD)	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
< 250 million	38	9.6%	13	21.7%	816	9.8%
250 million < 1 billion	42	10.7%	6	10.0%	740	8.9%
1 billion < 5 billion	61	15.5%	10	16.7%	1,063	12.8%
5 billion < 20 billion	62	15.7%	3	5.0%	1,110	13.4%
20 billion < 50 billion	15	3.8%	6	10.0%	681	8.2%
50 billion < 250 billion	84	21.3%	3	5.0%	1,194	14.4%
> 250 billion	12	3.0%	1	1.7%	681	8.2%
N/A	79	20.1%	18	30.0%	1,907	23.0%
1 Billion<5 Billion	0	0.0%	0	0.0%	1	0.0%

AUM (in \$USD)	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
5 Billion<20 Billion	0	0.0%	0	0.0%	1	0.0%
Prefer not to answer	1	0.3%	0	0.0%	96	1.2%
Subtotal / % of Total	394	92.7%	60	71.4%	8,290	89.4%
No Data	31	100.0%	24	100.0%	988	100.0%
Subtotal / % of Total	31	7.3%	24	28.6%	988	10.6%
Total	425		84		9,278	

Parent Assets Under Management

If your investment business is owned by a larger firm, please also provide the Assets Under Management of your parent company.

Parent AUM (in \$USD)	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
< 250 million	3	1.0%	0	0.0%	79	1.2%
250 million < 1 billion	4	1.4%	1	2.4%	34	0.5%
1 billion < 5 billion	3	1.0%	2	4.9%	84	1.3%
5 billion < 20 billion	21	7.1%	2	4.9%	198	3.0%
20 billion < 50 billion	4	1.4%	1	2.4%	184	2.8%
50 billion < 250 billion	6	2.0%	2	4.9%	506	7.7%
> 250 billion	16	5.4%	3	7.3%	819	12.5%
N/A	237	80.3%	30	73.2%	4,543	69.5%
Prefer not to answer	1	0.3%	0	0.0%	93	1.4%
Subtotal / % of Total	295	69.4%	41	48.8%	6,540	70.5%
No Data	130	100.0%	43	100.0%	2,738	100.0%
Subtotal / % of Total	130	30.6%	43	51.2%	2,738	29.5%
Total	425		84		9,278	

Primary Asset Base

If you are involved in asset management, which best describes the primary entity that most directly holds those assets?

Primary Asset Base	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Institutional	103	26.1%	13	21.7%	3,080	37.2%
Private	123	31.2%	19	31.7%	2,008	24.2%
Both	93	23.6%	7	11.7%	917	11.1%
N/A	75	19.0%	21	35.0%	2,281	27.5%
\$2.2Billion	0	0.0%	0	0.0%	1	0.0%
Subtotal / % of Total	394	92.7%	60	71.4%	8,287	89.3%
No Data	31	100.0%	24	100.0%	991	100.0%
Subtotal / % of Total	31	7.3%	24	28.6%	991	10.7%
Total	425		84		9,278	

Institutional Asset Type

Which of the following best describes the primary type of institutional entity that most directly holds those assets?

Institutional Asset Type	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Bank/Investment Bank	25	12.8%	5	25.0%	433	10.8%
Endowment/Foundation	18	9.2%	2	10.0%	445	11.1%
External Corporations	8	4.1%	1	5.0%	145	3.6%
Government/Municipal Entity	7	3.6%	1	5.0%	91	2.3%
Hedge Fund	4	2.0%	0	0.0%	142	3.6%
Insurance Company	12	6.1%	2	10.0%	787	19.7%
Internal Corporate/Proprietary	2	1.0%	0	0.0%	41	1.0%
Mutual Fund/Investment Company	67	34.2%	5	25.0%	708	17.7%
Pension Fund	21	10.7%	2	10.0%	830	20.8%
Private Equity Fund	2	1.0%	0	0.0%	57	1.4%
Other	30	15.3%	2	10.0%	318	8.0%
Subtotal / % of Total	196	46.1%	20	23.8%	3,997	43.1%
No Data	229	100.0%	64	100.0%	5,281	100.0%
Subtotal / % of Total	229	53.9%	64	76.2%	5,281	56.9%
Total	425		84		9,278	

Average Account Value

Please indicate the average account value for the private individuals that you personally advise.

Average Account Value	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Less than US\$1 million	59	27.2%	10	38.5%	784	26.4%
US\$1 million to 5 million	70	32.3%	9	34.6%	967	32.5%
US\$5 million to 10 million	8	3.7%	1	3.8%	257	8.6%
US\$10 million to 50 million	3	1.4%	0	0.0%	161	5.4%
US\$50 million to 100 million	0	0.0%	0	0.0%	38	1.3%
More than US\$100 million	4	1.8%	0	0.0%	63	2.1%
Not Applicable	73	33.6%	6	23.1%	705	23.7%
Subtotal / % of Total	217	51.1%	26	31.0%	2,975	32.1%
No Data	208	100.0%	58	100.0%	6,303	100.0%
Subtotal / % of Total	208	48.9%	58	69.0%	6,303	67.9%
Total	425		84		9,278	

Primary Investment Practice

If applicable, which of the following best describes the primary type of investments you work with?

Investment Practice	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Commodities	1	0.3%	0	0.0%	59	0.7%
Derivatives	3	0.8%	0	0.0%	222	2.7%
Equities	219	55.9%	23	38.3%	3,465	42.0%
Fixed Income	69	17.6%	12	20.0%	1,829	22.2%
Foreign Currency	1	0.3%	0	0.0%	24	0.3%
Hedge Funds	0	0.0%	0	0.0%	218	2.6%
Indexed	0	0.0%	0	0.0%	80	1.0%
Private Equity	12	3.1%	0	0.0%	279	3.4%
Real Estate	5	1.3%	0	0.0%	161	2.0%
Structured Products	6	1.5%	1	1.7%	133	1.6%
Venture Capital	2	0.5%	0	0.0%	31	0.4%
Other	16	4.1%	2	3.3%	429	5.2%
Not Applicable	58	14.8%	22	36.7%	1,314	15.9%
Subtotal / % of Total	392	92.2%	60	71.4%	8,244	88.9%
No Data	33	100.0%	24	100.0%	1,034	100.0%
Subtotal / % of Total	33	7.8%	24	28.6%	1,034	11.1%
Total	425		84		9,278	

Investment Practice (select all)

If applicable, select all types of investments you work with.

Investment Practice	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Commodities	80	20.6%	7	11.9%	1,639	20.2%
Derivatives	95	24.5%	17	28.8%	2,271	28.0%
Equities	279	71.9%	31	52.5%	4,985	61.4%
Fixed Income	251	64.7%	32	54.2%	4,975	61.3%
Foreign Currency	55	14.2%	4	6.8%	1,180	14.5%
Hedge Funds	60	15.5%	6	10.2%	1,721	21.2%
Indexed	90	23.2%	10	16.9%	1,805	22.2%
Private Equity	67	17.3%	8	13.6%	1,740	21.4%
Real Estate	75	19.3%	13	22.0%	1,868	23.0%
Structured Products	59	15.2%	7	11.9%	1,620	19.9%
Venture Capital	29	7.5%	2	3.4%	872	10.7%
Other	35	9.0%	7	11.9%	817	10.1%
Not Applicable	55	14.2%	22	37.3%	1,299	16.0%
Subtotal / % of Total	388	91.3%	59	70.2%	8,122	87.5%
Total	425		84		9,278	

Buy Side - Sell Side

Which of the following BEST describes your professional responsibilities:

Buy Side - Sell Side	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Buy Side	256	65.0%	29	48.3%	4,849	58.5%
Sell Side	20	5.1%	5	8.3%	850	10.3%
Buy Side / Sell Side	28	7.1%	5	8.3%	439	5.3%
Neither	90	22.8%	21	35.0%	2,146	25.9%
Investment Oversight	0	0.0%	0	0.0%	1	0.0%
Subtotal / % of Total	394	92.7%	60	71.4%	8,285	89.3%
No Data	31	100.0%	24	100.0%	993	100.0%
Subtotal / % of Total	31	7.3%	24	28.6%	993	10.7%
Total	425		84		9,278	

Occupation

Which of the following BEST describes your primary job function or responsibility?

Occupation	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Accountant/Auditor	4	1.1%	1	1.8%	100	1.3%
Broker	3	0.8%	1	1.8%	70	0.9%
Chief Executive	38	10.0%	6	10.9%	630	7.9%
Consultant	13	3.4%	2	3.6%	599	7.6%
Corporate Financial Analyst	14	3.7%	0	0.0%	269	3.4%
Financial Advisor	22	5.8%	4	7.3%	433	5.5%
Investment Banking Analyst	9	2.4%	1	1.8%	172	2.2%
Manager of Managers	11	2.9%	2	3.6%	299	3.8%
Portfolio Manager	158	41.7%	18	32.7%	2,404	30.3%
Private Banker	0	0.0%	0	0.0%	14	0.2%
Relationship Manager	15	4.0%	0	0.0%	341	4.3%
Research Analyst	61	16.1%	6	10.9%	1,529	19.3%
Risk Manager	4	1.1%	2	3.6%	305	3.8%
Strategist	10	2.6%	2	3.6%	156	2.0%
Trader	5	1.3%	2	3.6%	207	2.6%
Other	12	3.2%	8	14.5%	356	4.5%
Performance Measurement Specialist	0	0.0%	0	0.0%	48	0.6%
Subtotal / % of Total	379	89.2%	55	65.5%	7,932	85.5%
Total	425		84		9,278	

Topics of Interest

Please indicate the topics in which you are interested.

Areas of Interest	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Alternative Investments	138	34.6%	24	35.3%	3,456	40.9%
Behavioral Finance	182	45.6%	33	48.5%	3,999	47.4%
Corporate Finance	116	29.1%	28	41.2%	2,520	29.9%
Derivatives	110	27.6%	21	30.9%	2,712	32.1%
Economics	243	60.9%	38	55.9%	4,905	58.1%
Equity Investments	285	71.4%	41	60.3%	5,286	62.6%
Financial Statement Analysis	140	35.1%	29	42.6%	3,023	35.8%
Fixed Income	199	49.9%	29	42.6%	4,382	51.9%
Leadership, Management, and Communication Skills	90	22.6%	14	20.6%	1,987	23.5%
None of the Above	28	7.0%	7	10.3%	468	5.5%
Performance Measurement and Evaluation	83	20.8%	22	32.4%	2,011	23.8%
Portfolio Management	271	67.9%	48	70.6%	5,539	65.6%
Private Wealth Management	120	30.1%	21	30.9%	2,783	33.0%
Quantitative Methods	98	24.6%	24	35.3%	2,637	31.2%
Risk Management	143	35.8%	25	36.8%	3,238	38.4%
Standards, Ethics, and Regulations (SER)	100	25.1%	19	27.9%	2,296	27.2%
Subtotal / % of Total	399	93.9%	68	81.0%	8,440	91.0%

Areas of Interest	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Total	425		84		9,278	

Additional Designations

Other Designations	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
ACA-UK, Australia, New Zealand	0	0.0%	0	0.0%	3	0.2%
ACCA	0	0.0%	0	0.0%	2	0.1%
ASA -Accredited Snr. Appraiser	4	5.6%	1	5.6%	38	2.1%
ASA -Assoc., Society of Actuaries	2	2.8%	0	0.0%	43	2.4%
ASIP -Formerly AIMR, UK	0	0.0%	0	0.0%	4	0.2%
CA -(Australia)	0	0.0%	0	0.0%	1	0.1%
CA -(Canada)	0	0.0%	0	0.0%	19	1.1%
CA -(South Africa)	0	0.0%	0	0.0%	2	0.1%
CAIA	2	2.8%	0	0.0%	115	6.5%
CCM -(US)	2	2.8%	1	5.6%	38	2.1%
CEFA -(Europe)	0	0.0%	0	0.0%	2	0.1%
CFM -(US)	2	2.8%	1	5.6%	34	1.9%
CFP	13	18.3%	5	27.8%	312	17.6%
CFS	0	0.0%	0	0.0%	9	0.5%
CGA -(Canada)	0	0.0%	0	0.0%	1	0.1%
CIA (US)	2	2.8%	0	0.0%	19	1.1%
CIC	2	2.8%	0	0.0%	55	3.1%
CIMA	1	1.4%	0	0.0%	59	3.3%
CIMA -(UK)	0	0.0%	0	0.0%	2	0.1%
CLU	2	2.8%	0	0.0%	46	2.6%
CMA (Japan)	1	1.4%	0	0.0%	3	0.2%
CMA -(Canada)	0	0.0%	0	0.0%	6	0.3%
CMA -(US)	4	5.6%	2	11.1%	62	3.5%
CMT	0	0.0%	0	0.0%	26	1.5%
CPA	34	47.9%	10	55.6%	801	45.3%
CPA (Australia)	1	1.4%	0	0.0%	6	0.3%
CPA-PFS	1	1.4%	0	0.0%	10	0.6%
CQF	0	0.0%	0	0.0%	3	0.2%
CRFA -(China)	0	0.0%	0	0.0%	1	0.1%
CTA -(Canada)	0	0.0%	0	0.0%	1	0.1%
CTFA	1	1.4%	0	0.0%	27	1.5%
CTP -(US)	3	4.2%	0	0.0%	49	2.8%
ChFC	3	4.2%	0	0.0%	47	2.7%
FCSI (Canada)	0	0.0%	0	0.0%	4	0.2%
FIA -(UK)	0	0.0%	0	0.0%	1	0.1%
FMA	0	0.0%	0	0.0%	2	0.1%
FRM	3	4.2%	0	0.0%	136	7.7%
FSA	2	2.8%	2	11.1%	121	6.8%
FSIP -(UK)	0	0.0%	0	0.0%	1	0.1%
IMC -(UK)	0	0.0%	0	0.0%	4	0.2%
MSI -(UK)	0	0.0%	0	0.0%	1	0.1%
PRM	0	0.0%	0	0.0%	16	0.9%
Subtotal / % of Total	71	16.7%	18	21.4%	1,769	19.1%
Total	425		84		9,278	

Counts by Preferred Country

Preferred Country	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
Australia	0	0.0%	0	0.0%	3	0.0%
Azerbaijan	0	0.0%	0	0.0%	1	0.0%
Bermuda	0	0.0%	0	0.0%	4	0.0%
Canada	0	0.0%	0	0.0%	15	0.2%

Preferred Country	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
China	0	0.0%	0	0.0%	4	0.0%
France	0	0.0%	0	0.0%	1	0.0%
Germany	0	0.0%	0	0.0%	1	0.0%
Hong Kong	0	0.0%	0	0.0%	2	0.0%
Hungary	0	0.0%	0	0.0%	1	0.0%
India	0	0.0%	0	0.0%	2	0.0%
Mexico	0	0.0%	0	0.0%	1	0.0%
Netherlands	0	0.0%	0	0.0%	1	0.0%
Puerto Rico	0	0.0%	0	0.0%	3	0.0%
South Africa	0	0.0%	0	0.0%	1	0.0%
Taiwan	0	0.0%	0	0.0%	2	0.0%
Tunisia	0	0.0%	0	0.0%	1	0.0%
USA	425	100.0%	84	100.0%	9,222	99.4%
United Kingdom	0	0.0%	0	0.0%	13	0.1%
Subtotal / % of Total	425	100.0%	84	100.0%	9,278	100.0%
Total	425		84		9,278	

U.S. State

State	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
AK	1	0.2%	0	0.0%	5	0.1%
AL	0	0.0%	0	0.0%	1	0.0%
AR	1	0.2%	0	0.0%	6	0.1%
AZ	0	0.0%	0	0.0%	4	0.0%
CA	1	0.2%	0	0.0%	53	0.6%
CO	1	0.2%	0	0.0%	12	0.1%
CT	1	0.2%	0	0.0%	17	0.2%
DC	0	0.0%	0	0.0%	7	0.1%
DE	0	0.0%	0	0.0%	1	0.0%
FL	2	0.5%	0	0.0%	37	0.4%
GA	0	0.0%	0	0.0%	14	0.2%
IA	0	0.0%	0	0.0%	349	3.8%
ID	0	0.0%	0	0.0%	1	0.0%
IL	1	0.2%	1	1.2%	3,494	37.9%
IN	0	0.0%	0	0.0%	291	3.2%
KS	250	58.8%	53	63.1%	253	2.7%
KY	0	0.0%	0	0.0%	37	0.4%
LA	0	0.0%	0	0.0%	2	0.0%
MA	0	0.0%	0	0.0%	13	0.1%
MD	0	0.0%	0	0.0%	9	0.1%
ME	0	0.0%	0	0.0%	2	0.0%
MI	0	0.0%	0	0.0%	485	5.3%
MN	0	0.0%	0	0.0%	1,030	11.2%
MO	162	38.1%	28	33.3%	719	7.8%
MT	0	0.0%	0	0.0%	1	0.0%
NC	1	0.2%	0	0.0%	11	0.1%
ND	0	0.0%	0	0.0%	8	0.1%
NE	1	0.2%	0	0.0%	185	2.0%
NH	0	0.0%	0	0.0%	1	0.0%
NJ	1	0.2%	0	0.0%	22	0.2%
NM	0	0.0%	0	0.0%	4	0.0%
NV	0	0.0%	0	0.0%	1	0.0%
NY	2	0.5%	0	0.0%	59	0.6%
OH	0	0.0%	1	1.2%	1,201	13.0%
OK	0	0.0%	0	0.0%	2	0.0%
OR	0	0.0%	0	0.0%	2	0.0%
PA	0	0.0%	0	0.0%	19	0.2%

State	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
RI	0	0.0%	0	0.0%	1	0.0%
SC	0	0.0%	0	0.0%	2	0.0%
SD	0	0.0%	0	0.0%	15	0.2%
TN	0	0.0%	0	0.0%	4	0.0%
TX	0	0.0%	1	1.2%	25	0.3%
UT	0	0.0%	0	0.0%	2	0.0%
VA	0	0.0%	0	0.0%	12	0.1%
WA	0	0.0%	0	0.0%	6	0.1%
WI	0	0.0%	0	0.0%	791	8.6%
WV	0	0.0%	0	0.0%	1	0.0%
Subtotal / % of Total	425	100.0%	84	100.0%	9,217	99.9%
Unspecified	0		0		5	100.0%
Subtotal / % of Total	0	0.0%	0	0.0%	5	0.1%
Total	425		84		9,222	

Canadian Province

Province	Active Members	% of Subtotal	Unaffiliated Members	% of Subtotal	Society Region	% of Subtotal
ON	0		0		1	6.7%
Ontario	0		0		13	86.7%
Quebec	0		0		1	6.7%
Subtotal / % of Total	0		0		15	100.0%
Total	0		0		15	



Society Member Historical Trends Report

Time run: 8/3/2010 11:58:46 AM

Society Name

Kansas City CFA Society

Society Region

Midwestern US

Society Name: Kansas City CFA Society

Member Year	Total Members	Growth	% Growth	Charterholder	Growth	% Growth	Non-Charterholder	Growth	% Growth
1994	241	0	0.0%	132	0	0.0%	109	0	0.0%
1995	230	-11	-4.6%	131	-1	-0.8%	99	-10	-9.2%
1996	229	-1	-0.4%	141	10	7.6%	88	-11	-11.1%
1997	263	34	14.8%	160	19	13.5%	103	15	17.0%
1998	263	0	0.0%	167	7	4.4%	96	-7	-6.8%
1999	276	13	4.9%	184	17	10.2%	92	-4	-4.2%
2000	290	14	5.1%	202	18	9.8%	88	-4	-4.3%
2001	325	35	12.1%	219	17	8.4%	106	18	20.5%
2002	347	22	6.8%	250	31	14.2%	97	-9	-8.5%
2003	359	12	3.5%	266	16	6.4%	93	-4	-4.1%
2004	363	4	1.1%	281	15	5.6%	82	-11	-11.8%
2005	378	15	4.1%	295	14	5.0%	83	1	1.2%
2006	392	14	3.7%	304	9	3.1%	88	5	6.0%
2007	415	23	5.9%	340	36	11.8%	75	-13	-14.8%
2008	409	-6	-1.4%	333	-7	-2.1%	76	1	1.3%
2009	421	12	2.9%	345	12	3.6%	76	0	0.0%
2010	419	-2	-0.5%	344	-1	-0.3%	75	-1	-1.3%

Society Region: Midwestern US

Member Year	Total Members	Growth	% Growth	Charterholder	Growth	% Growth	Non-Charterholder	Growth	% Growth
1994	4,109	0	0.0%	2708	0	0.0%	1,401	0	0.0%
1995	4,381	272	6.6%	3160	452	16.7%	1,221	-180	-12.8%
1996	4,609	228	5.2%	3114	-46	-1.5%	1,495	274	22.4%
1997	4,954	345	7.5%	3405	291	9.3%	1,549	54	3.6%
1998	5,231	277	5.6%	3679	274	8.0%	1,552	3	0.2%
1999	5,556	325	6.2%	3955	276	7.5%	1,601	49	3.2%
2000	5,911	355	6.4%	4337	382	9.7%	1,574	-27	-1.7%
2001	6,242	331	5.6%	4705	368	8.5%	1,537	-37	-2.4%
2002	6,723	481	7.7%	5196	491	10.4%	1,527	-10	-0.7%
2003	7,059	336	5.0%	5467	271	5.2%	1,592	65	4.3%
2004	7,488	429	6.1%	6008	541	9.9%	1,480	-112	-7.0%
2005	7,888	400	5.3%	6429	421	7.0%	1,459	-21	-1.4%
2006	8,284	396	5.0%	6704	275	4.3%	1,580	121	8.3%
2007	8,830	546	6.6%	7339	635	9.5%	1,491	-89	-5.6%
2008	8,995	165	1.9%	7540	201	2.7%	1,455	-36	-2.4%
2009	9,039	44	0.5%	7694	154	2.0%	1,345	-110	-7.6%
2010	9,132	93	1.0%	7857	163	2.1%	1,275	-70	-5.2%

CFA Institute Global Totals

Member Year	Total Members	Growth	% Growth	CFA	Growth	% Growth	Non-CFA	Growth	% Growth
1994	24,496	0	0.0%	20,150	0	0.0%	4,346	0	0.0%

Member Year	Total Members	Growth	% Growth	CFA	Growth	% Growth	Non-CFA	Growth	% Growth
1995	26,359	1,863	7.6%	21,917	1,767	8.8%	4,442	96	2.2%
1996	27,827	1,468	5.6%	23,990	2,073	9.5%	3,837	-605	-13.6%
1997	30,414	2,587	9.3%	24,194	204	0.9%	6,220	2,383	62.1%
1998	33,523	3,109	10.2%	25,952	1,758	7.3%	7,571	1,351	21.7%
1999	37,417	3,894	11.6%	26,726	774	3.0%	10,691	3,120	41.2%
2000	43,091	5,674	15.2%	31,853	5,127	19.2%	11,238	547	5.1%
2001	50,818	7,727	17.9%	37,209	5,356	16.8%	13,609	2,371	21.1%
2002	59,112	8,294	16.3%	45,337	8,128	21.8%	13,775	166	1.2%
2003	65,248	6,136	10.4%	50,439	5,102	11.3%	14,809	1,034	7.5%
2004	71,178	5,930	9.1%	57,650	7,211	14.3%	13,528	-1,281	-8.7%
2005	76,971	5,793	8.1%	64,387	6,737	11.7%	12,584	-944	-7.0%
2006	83,431	6,460	8.4%	69,313	4,926	7.7%	14,118	1,534	12.2%
2007	92,746	9,315	11.2%	79,132	9,819	14.2%	13,614	-504	-3.6%
2008	95,826	3,080	3.3%	82,601	3,469	4.4%	13,225	-389	-2.9%
2009	96,573	747	0.8%	84,768	2,167	2.6%	11,805	-1,420	-10.7%
2010	101,497	4,924	5.1%	89,582	4,814	5.7%	11,915	110	0.9%

Constant Contact Survey Results

Survey Name: Kansas City CFA Member Survey

Response Status: Partial & Completed

Filter: None

Jan 05, 2010 1:13:32 PM

1. 1. How many years have you been a member of the Kansas City CFA Society?

	Number of Response(s)	Response Ratio
less than 5	33	33.3%
6-10	32	32.3%
11-15	12	12.1%
16-20	7	7.0%
20+	15	15.1%
No Responses	0	0.0%
Total	99	100%

2. Please indicate your area of concentration:

	Number of Response(s)	Response Ratio
Equity & Fixed Income	25	25.2%
Analyst	23	23.2%
CEO, Chairman, Partner, Principal	4	4.0%
Chief Investment Officer	6	6.0%
Investment Banker	3	3.0%
Investment Counselor	7	7.0%
Investment Firm Manager	3	3.0%
Portfolio Manager	38	38.3%
Sales/Marketing	6	6.0%
Securities Trader	2	2.0%
Other	1	1.0%
Other	15	15.1%
Total	99	100%
3 Comment(s)		

3. Please indicate your industry classification:

	Number of Response(s)	Response Ratio
Investment Company/Mutual Fund	46	46.4%
Commercial/Retail Banking/Bank Trust	18	18.1%
Investment Management Counseling	9	9.0%
Consulting Firm	1	1.0%
Other businesses including government/academic	13	13.1%
Broker dealer/Investment Banking	6	6.0%
Insurance Company	4	4.0%
No Responses	2	2.0%
Total	99	100%

4. How would you assess the overall value of your society membership relative to the annual dues you pay (\$90)? (Please assess on a 1 to 10 scale, where "1" means not at all valuable and "10" means extremely valuable.)

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	1	2	3	4	5	6	7	8	9	10
	3	5	1	5	15	17	22	20	5	5
	3%	5%	1%	5%	15%	17%	22%	20%	5%	5%

7 Comment(s)

5. Please rate the extent to which you agree/disagree with the proposed vision of the Kansas City CFA Society. The mission of the society is to facilitate the professional development of the financial community by: Providing services of direct benefit to its members. Enhancing the respect and visibility of the Society and its members. Promoting adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

	Number of Response(s)	Response Ratio
Strongly agree	44	44.4%
Agree	54	54.5%
Disagree	1	1.0%
Strongly disagree	0	0.0%
No Responses	0	0.0%
Total	99	100%

6. Are there other types of functions you would like your society to engage in?

17 Response(s)

7. How many society events did you attend in the past 12 months?

	Number of Response(s)	Response Ratio
None	22	22.2%
1-2	38	38.3%
3-5	28	28.2%
6-10	10	10.1%
10+	1	1.0%
No Responses	0	0.0%
Total	99	100%

8. If you answered "None" to the previous question, what is the main reason?

	Number of Response(s)	Response Ratio
Lack of time	10	10.1%
Lack of interest	9	9.0%
Inconvenient location	2	2.0%
Inconvenient times or days	2	2.0%
Was not informed about the events	0	0.0%
Other	7	7.0%
Total	99	100%

9 Comment(s)

9. How important is it that your society engages in each of the following types of function? Rate on a scale of 1-10 with 10 being most important

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	1	2	2	4	5	6	7	8	9	10
Promote the CFA charter locally	1 1%	7 7%	7 7%	3 3%	9 9%	7 7%	9 9%	16 16%	17 17%	23 23%
Hold educational events	0 0%	1 1%	0 0%	3 3%	5 5%	7 7%	10 10%	21 21%	17 17%	35 35%
Hold networking events	1 1%	2 2%	4 4%	2 2%	8 8%	9 9%	16 16%	18 18%	11 11%	27 28%
Provide tutoring and or prep courses for CFA candidates	11 11%	1 1%	5 5%	11 11%	10 10%	13 13%	15 15%	15 15%	7 7%	11 11%
Hold career development events	3 3%	1 1%	5 5%	4 4%	9 9%	10 10%	16 16%	21 21%	12 12%	18 18%
Provide career development resources	4 4%	1 1%	5 5%	3 3%	8 8%	4 4%	15 15%	24 24%	13 13%	21 21%
Hold events on soft skills development (e.g. leadership, communication)	8 8%	8 8%	10 10%	8 8%	18 18%	14 14%	10 10%	16 16%	2 2%	5 5%
2 Comment(s)										

10. What was your number one reason for attending the event?

	Number of Response(s)	Response Ratio
Networking opportunity	15	15.1%
Educational opportunity	14	14.1%
Sales leads	0	0.0%
Interest in topic/speaker	44	44.4%
Keep current with industry trends/news	11	11.1%
Required by my company	0	0.0%
Other	3	3.0%
No Responses	12	12.1%
Total	99	100%

11. What is your preferred time for Society events?

	Number of Response(s)	Response Ratio
Breakfast	11	11.1%
Morning	0	0.0%
Lunchtime	69	69.6%
Afternoon	9	9.0%
Evening	16	16.1%
Total	99	100%

12. What is your preferred location for Society events?

	Number of Response(s)	Response Ratio
The Plaza	66	66.6%
Overland Park	28	28.2%
Lee's Summit	3	3.0%
Downtown KC	14	14.1%
Total	99	100%
4 Comment(s)		

13. Please indicate your level of interest in attending a society program focused on each of the topics listed below. (Please indicate your level of interest on a 1 to 10 scale, where "1" means not at all interested and "10" means extremely interested.)

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	1	2	3	4	5	6	7	8	9	10
Ethical and Professional Standards	16 16%	16 16%	17 17%	4 4%	17 17%	9 9%	9 9%	5 5%	2 2%	3 3%
Quantitative Methods	12 12%	12 12%	9 9%	5 5%	23 23%	8 8%	14 14%	7 7%	2 2%	6 6%
Economics	3 3%	1 1%	5 5%	3 3%	9 9%	6 6%	11 11%	23 23%	11 11%	26 27%
Financial Statement Analysis	5 5%	9 9%	9 9%	4 4%	10 10%	13 13%	14 14%	14 14%	8 8%	13 13%
Corporate Finance	5 5%	8 8%	10 10%	7 7%	18 18%	13 13%	14 14%	10 10%	6 6%	7 7%
Equity Investments	3 3%	0 0%	3 3%	5 5%	4 4%	4 4%	13 13%	23 23%	22 22%	22 22%
Fixed Income Investments	5 5%	1 1%	3 3%	9 9%	9 9%	7 7%	19 19%	15 15%	12 12%	19 19%
Derivatives	11 11%	5 5%	5 5%	10 10%	14 14%	9 9%	13 13%	13 13%	9 9%	10 10%
Portfolio Management	2 2%	1 1%	1 1%	2 2%	3 3%	10 10%	6 6%	23 23%	17 17%	33 34%
Risk Management	1 1%	2 2%	3 3%	4 4%	9 9%	11 11%	20 21%	19 20%	14 14%	14 14%

4 Comment(s)

14. Continued from previous question...Please indicate your level of interest in attending a society program focused on each of the topics listed below. (Please indicate your level of interest on a 1 to 10 scale, where "1" means not at all interested and "10" means extremely interested.)

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	1	2	3	4	5	6	7	8	9	10
Wealth Management	4 4%	7 7%	2 2%	3 3%	11 11%	8 8%	13 13%	14 14%	13 13%	23 23%
Hedge Funds	8 8%	3 3%	5 5%	7 7%	12 12%	8 8%	18 18%	20 20%	9 9%	8 8%
Private Equity	7 7%	4 4%	5 5%	6 6%	16 16%	5 5%	20 20%	18 18%	6 6%	11 11%
Other Alternative Investments (Commodities, Real Estate, etc.)	3 3%	1 1%	3 3%	7 7%	8 8%	10 10%	16 16%	29 30%	8 8%	13 13%
Soft Skills (leadership, communication, etc.)	10 10%	10 10%	9 9%	8 8%	14 14%	10 10%	14 14%	10 10%	6 6%	6 6%
Career Development	12 12%	5 5%	4 4%	4 4%	17 17%	14 14%	16 16%	8 8%	4 4%	15 15%

1 Comment(s)

15. How would you assess the overall usefulness of our Website? (Please assess on a 1 to 10 scale, where "1" means not at all useful and "10" means extremely useful.)

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	1	2	3	4	5	6	7	8	9	10
	4 4%	5 5%	7 8%	4 4%	23 25%	18 19%	15 16%	13 14%	2 2%	2 2%

13 Comment(s)

16. What changes would you like to see on our website?

12 Response(s)

17. In regards to promoting the CFA charter and our society chapter in our region, to whom would you like to see CFA Kansas City market? Please rank the following market groups in terms of how important you think it is that local promotion efforts be focused on them.

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	Least							
	1	2	3	4	5	6	7	8
Employers	8 9%	8 9%	3 3%	8 9%	13 14%	11 12%	10 11%	29 32%
Universities and Professors	7 8%	22 24%	19 21%	11 12%	13 14%	7 8%	6 7%	5 6%
University Students	20 22%	19 21%	13 14%	15 17%	5 6%	9 10%	7 8%	2 2%
Regulators	22 24%	11 12%	18 20%	7 8%	14 16%	12 13%	4 4%	2 2%
Potential Business Clients	0 0%	8 9%	9 10%	9 10%	15 17%	20 22%	23 26%	6 7%
Investment Professionals not currently holding a CFA Charter	14 16%	7 8%	19 21%	18 20%	11 12%	8 9%	7 8%	6 7%
High-net-worth investors	1 1%	9 10%	6 7%	11 12%	5 6%	10 11%	20 22%	28 31%
General investing public	18 20%	6 7%	3 3%	11 12%	14 16%	13 14%	13 14%	12 13%
0 Comment(s)								

18. Please indicate the extent to which you agree or disagree with the following statements about CFA Kansas City.

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.	Strongly Disagree					Strongly Agree	
	Strongly Disagree	Disagree	Neither	Agree	Agree	Strongly Agree	
My society keeps me well informed of upcoming programs and activities	0 0%	0 0%	2 2%	57 59%	38 39%		
My society is effective in its overall communications with members	0 0%	3 3%	15 15%	58 60%	21 22%		
My society is effective in seeking input and feedback from its members	0 0%	15 16%	24 25%	48 50%	9 9%		
My society offers relevant and valuable programs and services	0 0%	8 8%	17 18%	62 64%	10 10%		
1 Comment(s)							

19. Please rank the following methods of communication in order of your preference.

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	Least				
	1	2	3	4	5
Email to personal email address	20 22%	14 15%	9 10%	35 38%	15 16%
Email to work email address	11 12%	5 5%	1 1%	10 11%	66 71%
Postal Mail	22 24%	27 29%	34 37%	6 6%	4 4%
Posting on website	33 35%	23 25%	18 19%	13 14%	6 6%
Postcard notice	7 8%	24 26%	31 33%	29 31%	2 2%

2 Comment(s)

20. What are the greatest areas of opportunity for the Kansas City CFA Society? Where would you like to see the society in the next one year? Three years? Five years?

25 Response(s)

21. Please provide additional comments, recommendations, and suggestions.

7 Response(s)

22. Thank you for taking the time to complete this survey! If you have additional questions or comments, please contact Joan Hecker at 314.520.3564 or Joan_Hecker@sbcglobal.net

3 Response(s)
