

Thank you very much for the honor of serving as President. I'd especially like to thank my family and coworkers (some of whom are here tonight) If it wasn't for them, I'd probably be a lawyer right now, which I have to admit was starting to look pretty attractive a year ago March. I'd also like to thank all of the rest of the board members, both past and present. Our board has exemplified the phrase "many hands make light work" and along with our exceptional director Kim Wiggins, they've made my involvement these past years incredibly rewarding, both professionally and personally.

When I originally signed up for the exam, I had no idea the opportunities obtaining those three little letters after my name would grant me. It has not only given me the training and development to best serve my clients, but through my involvement with CFA Detroit and CFA Institute, I've met some of my best friends.

The CFA Society of Detroit is comprised of investment professionals with many different job descriptions, but we all share a common goal of promoting ethical and professional standards within our industry. Because of their commitment to this goal, our members and candidates are distinguished by their integrity, professional excellence, and dedication to serving the needs of investors first. This afternoon our board met for a strategic planning session, led by Jeff Matthias from CFA Institute. We discussed this goal, and what our responsibilities are as a society to our members. Some of the major discussion topics were governance, volunteerism, programming, and public awareness.

Furthering the public's awareness of the CFA Society of Detroit and the charter itself has been a major focus for some time. This past year, with help from CFA Institute, we've spent a great deal of time and resources working with a local public relations firm. With their help, we've had a number of stories placed in the local media including a feature article by Susan Tompor of the Free Press. We had a fantastic forecast luncheon with over 360 attendees and coverage on the evening news. We also commissioned a survey of Detroit area high net worth individuals on their awareness of CFA Detroit and discovered additional opportunities to promote our organization to them. We placed ads in the Detroit Symphony Orchestra's Performance Magazine, which was handed out at all spring 2010 performances and mailed to all season ticketholders. We also have an organized effort to have our events listed in the major local publications, and have sent personal invitations to members of the media to attend our events to learn about what our members are doing for their clients as well as the community. As a society, we will continue to work towards this public awareness goal along with CFA Institute, but like anything else we need our members involvement in order to succeed.

So I'm going to ask our members to get involved. As we continue to grow as a society and work towards the goals and objectives outlined by the board this afternoon, we will have a lot of opportunities for volunteers. Whether it's helping secure a speaker,

bringing clients, supervisors, and peers to our events, the forecast luncheon (We're working on another forecast luncheon for November, and I'd love to see us sell out the Troy Marriott two years in a row), helping with university outreach, planning a social outing, or simply reaching out to help mentor a new member or candidate, if your experience is anything like mine has been so far you will get back in multiples what you give out.

In today's environment of increased competition, it's important that we all serve as advocates and spokespeople for the charter and the CFA Society of Detroit. We've got great momentum building here in Detroit, and along with the rest of the board I will do my best this year to keep it going.