



LET'S BUILD A BETTER WORLD FOR INVESTING. LET'S MEASURE UP.

Let's make the financial world as diverse as the one we live in.
Let's put ethics at the heart of everything we do.
Let's always put investors' needs above our own.
Let's deliver real value for the investment fees we charge.
Let's create jobs, build bridges, ensure prosperity.

Let's do our part. Let's start today. Let's measure up.
Get started at letsmeasureup.org



Your society, Your membership





Pictures from CFA Society UK member events

12,000

MEMBERS STRONG AND STILL GROWING



Expand your professional knowledge

Stay ahead in your career

Develop your knowledge and keep up-to-date with industry insights:

- Attend professional development events and conferences, with over 50 events per year free to our members
- Get unlimited access to our online Knowledge Centre where you will find filmed events, webinars, podcasts, articles and presentations
- Take advantage of free CPD certificate programmes

Grow your professional network

Connect with over 12,000 of the most qualified investment practitioners in the UK:

- Network at a wide variety of educational and social events
- Join a special interest group to learn more about topics you are interested in or passionate about
- Get involved in the investment community as a volunteer

Improve your prospects

Take advantage of our career support services including 20 free career-related events per year and access to our Careers Centre where investment firms actively target CFA Society UK members.

Be a gender diversity champion

The CFA Society UK Gender Diversity Network is a forum designed to help improve the investment profession by promoting gender and diversity balance. Join the network and become a diversity champion, visit cfauk.org/diversity.

Lisa Lewin, CFA

Career path

Current position

- Associate Director, Country Risk, Mizuho

Previous positions

- Global Economist at BMI Research (Fitch Group)
- CFA Charter 2014
- Head of Sub-Saharan Africa Analysis at BMI Research (Fitch Group)
- Emerging Markets analyst at BMI Research (Fitch Group)
- Business Development at Aberdeen Asset Management

Education

- Graduated with an MA in Economics from University of Cambridge



Lisa Lewin, CFA. Member of CFA Society UK for 8 years

Analytical ability and a willingness to work hard

Lisa Lewin, CFA used interests she discovered whilst studying for the CFA Program to drive her career forward.

I work in country risk analysis, which involves understanding how countries are evolving politically and economically. The financial markets are a key driver of that evolution. As such, I have found it very beneficial to be able to draw upon the broad base of knowledge that the CFA curriculum has given me.

Furthermore, working in a bank, it is particularly useful to have an understanding of bonds. Concepts such as yield, tenor and covenants come up frequently in discussions with colleagues.

Aside from the technical knowledge, the CFA exams required effective time management, diligence and tenacity – all of which are highly valued in the workplace as well.

Key successes

Since I gained the CFA charter in 2014, I have changed role twice. Firstly, I was promoted to a Global Economist role at BMI Research (Fitch Group) in November 2014. Secondly, I was appointed as an Associate Director in the Country Risk department at Mizuho in February 2018.

While neither move was directly attributable to my CFA charter, I believe that it was one element that helped me to stand out from the pack of candidates. The CFA qualification is widely recognised and well-respected across the financial services industry. It signals a breadth of knowledge on the financial markets, analytical ability and a willingness to work hard.

Getting involved

I first became involved with CFA Society UK through attending study sessions that the society hosted, in preparation for the CFA exams. I found these sessions to be really useful; they helped me to master some challenging topics such as derivatives.

Over the past few years, I have attended many useful after-work talks, for instance on industry developments such as Mifid II, and soft skills including presenting and networking. I have also enjoyed the eminent speaker series; Sir Mervyn King's discussion at the Royal Institution was particularly memorable.

At each event there has been an opportunity to meet other members of CFA Society UK, and I've had many interesting conversations and made several valuable contacts this way.

Jason Baran, CFA

Career path

Current position

- Defaqto Investment Consultant, UK

Previous positions

- CFA Charter 2014
- Eastspring Japan Equity Analyst, Singapore
- Prudential Asia Regional Investment Coordinator, Hong Kong
- M&G Graduate Analyst, London

Education

- Graduated MPhil Statistics, University of Cambridge
- Graduated 1st Class Maths, Royal Holloway, University of London



Jason Baran, CFA, Member of CFA Society UK for 4 years

Credibility led to growth

Jason Baran, CFA uses his position as 'investment expert' in his firm to maximise his influence whilst using CFA Society UK resources to back up his thirst for professional knowledge.

CFA Society UK has been very useful for keeping me up-to-date with investment industry developments and maintaining my investment knowledge. Working outside of London in a small team, I'm seen as being the investment 'expert' within the firm, and part of my role is to educate my colleagues and our clients. By keeping up to date with CFA Society UK conferences, webinars, and using the online library, it's easy to find interesting and useful resources despite a busy schedule.

Facing challenges

Where I work at Defaqto, we rate and analyse all manner of multi-asset funds with varying strategies for the majority of financial advisers in the UK. Part of the company's culture is to be open and transparent, and hence we make our ratings analysis freely available to the funds we rate and our adviser clients. This openness means the methodology used in our ratings can be challenged very strongly by fund managers, and hence a key challenge is to ensure we are being fair, accurate and knowledgeable with our ratings.

Career credibility

I've been at Defaqto for almost 4 years now, in that time the number of funds that we rate, the number of advisers using our system, and the number of fund providers licensing their rating for use in their marketing, has grown massively. This is in part a result of the credibility we have created from our investment team's work.

Surprises

The most pleasant surprise of being a member of CFA Society UK is the quality of the events on offer. I find the conferences always have decent speakers and the quality of discussion very good.

CFA Society UK has taken on feedback to create more volunteering opportunities this year. Currently I'm involved in a working group analysing barriers to entry across the financial industry. Again, this is a great way to meet other knowledgeable professionals and stay on top of industry developments.