







| 1. How long have you been a member of CFA Society of Columbus? | | | Response Percent | Response Count |
|--|--|--------------------------|------------------|----------------|
| Less than a year | | | 8.5% | 9 |
| 1-5 years | | | 35.8% | 38 |
| 6-10 years | | | 26.4% | 28 |
| More than 10 years | | | 29.2% | 31 |
| | | answered question | | 106 |
| | | skipped question | | 1 |

| 2. Why did you join CFA Society of Columbus? Please check ALL that apply. | | | Response Percent | Response Count |
|---|--|--------------------------|------------------|----------------|
| to network | | | 75.7% | 81 |
| to hear speakers | | | 77.6% | 83 |
| to socialize | | | 35.5% | 38 |
| requirement by employer | | | 2.8% | 3 |
| requirement by CFA Institute to receive charter | | | 55.1% | 59 |
| Other | | | 8.4% | 9 |
| | | answered question | | 107 |
| | | skipped question | | 0 |

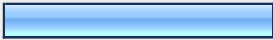
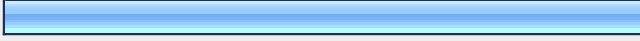
3. If you answered OTHER in question 2, please tell us the reason that you joined CFA Society of Columbus. If you did not check the OTHER choice in question 2, please continue with the next question.

| | | Response Count |
|--|--------------------------|----------------|
| | | 9 |
| | <i>answered question</i> | 9 |
| | <i>skipped question</i> | 98 |

4. Please check the ONE MAIN reason why you joined CFA Society of Columbus.

| | | Response Percent | Response Count |
|--|--|--------------------------|----------------|
| to network |  | 23.4% | 25 |
| to hear speakers |  | 34.6% | 37 |
| to socialize |  | 0.9% | 1 |
| requirement by employer |  | 0.9% | 1 |
| requirement by CFA Institute to receive charter |  | 38.3% | 41 |
| Other |  | 1.9% | 2 |
| | | <i>answered question</i> | 107 |
| | | <i>skipped question</i> | 0 |


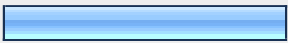



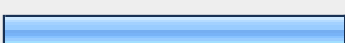
5. Who pays your annual dues to CFA Society of Columbus?

| | | Response Percent | Response Count |
|-------------------------|--|--------------------------|----------------|
| I do |  | 29.5% | 31 |
| My employer does |  | 70.5% | 74 |
| Other | | 0.0% | 0 |
| | | <i>answered question</i> | 105 |
| | | <i>skipped question</i> | 2 |

6. If you answered OTHER in question 5, please tell us who pays your annual dues to CFA Society of Columbus. If you did not select OTHER in question 5, please continue with the next question.








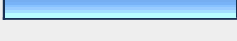
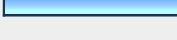
| | | Response Count |
|--|--------------------------|----------------|
| | | 0 |
| | <i>answered question</i> | 0 |
| | <i>skipped question</i> | 107 |

7. Which ONE of the following categories best represents your current primary OCCUPATION?

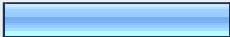

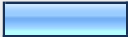

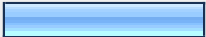
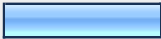

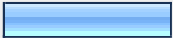
| | | Response Percent | Response Count |
|----------------------|---|--------------------------|----------------|
| sell-side analyst | | 0.0% | 0 |
| buy-side analyst |  | 18.7% | 20 |
| portfolio manager |  | 30.8% | 33 |
| broker |  | 0.9% | 1 |
| financial consultant |  | 9.3% | 10 |
| trader |  | 2.8% | 3 |
| OTHER |  | 37.4% | 40 |
| | | <i>answered question</i> | 107 |
| | | <i>skipped question</i> | 0 |

8. If you selected OTHER in question 7, please tell us your primary occupation. If you did not select OTHER in question 7, please continue with the next question.

| | | Response Count |
|--|--------------------------|----------------|
| | | 40 |
| | <i>answered question</i> | 40 |
| | <i>skipped question</i> | 67 |

| 9. Which ONE of the following categories best represents the type of PRODUCT you handle? | | | Response Percent | Response Count |
|--|---|--|--------------------------|----------------|
| domestic equity |  | | 20.0% | 21 |
| international equity |  | | 2.9% | 3 |
| private equity |  | | 2.9% | 3 |
| fixed income |  | | 24.8% | 26 |
| real estate |  | | 2.9% | 3 |
| hedge funds |  | | 1.0% | 1 |
| commodities/managed futures |  | | 1.0% | 1 |
| multiple asset |  | | 25.7% | 27 |
| OTHER |  | | 19.0% | 20 |
| | | | <i>answered question</i> | 105 |
| | | | <i>skipped question</i> | 2 |

| 10. If you selected OTHER in question 9, please tell us the category that best describes the type of product you handle. If you did not select OTHER in question 9, please continue with the next question. | | | Response Count |
|---|--|--------------------------|----------------|
| | | | 21 |
| | | <i>answered question</i> | 21 |
| | | <i>skipped question</i> | 86 |

| 11. Which ONE of the following categories best represents the INDUSTRY you currently work in? | | | |
|---|---|--------------------------|----------------|
| | | Response Percent | Response Count |
| insurance |  | 24.8% | 26 |
| education |  | 1.0% | 1 |
| private wealth |  | 13.3% | 14 |
| brokerage |  | 1.9% | 2 |
| pension funds |  | 21.9% | 23 |
| general asset management |  | 17.1% | 18 |
| hedge funds |  | 1.9% | 2 |
| OTHER |  | 18.1% | 19 |
| | | answered question | 105 |
| | | skipped question | 2 |

| 12. If you selected OTHER in question 11, please tell us the INDUSTRY that you currently work in. If you did not select OTHER in question 11, please continue with the next question. | | |
|---|--|--------------------------|
| | | Response Count |
| | | 20 |
| | | answered question |
| | | 20 |
| | | skipped question |
| | | 87 |

13. How long have you worked in the OCCUPATION-PRODUCT-INDUSTRY you answered in the previous questions? (Questions 7 through 12)

| | | Response Percent | Response Count |
|---------------------------|--|--------------------------|----------------|
| Less than 1 year | | 2.8% | 3 |
| 1-5 years | | 19.8% | 21 |
| 6-10 years | | 22.6% | 24 |
| More than 10 years | | 54.7% | 58 |
| | | answered question | 106 |
| | | skipped question | 1 |

14. Which of the following categories best represents the amount of assets under management that you usually work with?

| | | Response Percent | Response Count |
|--|--|--------------------------|----------------|
| Under 10 million | | 2.8% | 3 |
| 10-99 million | | 3.7% | 4 |
| 100 million - 1 billion | | 15.0% | 16 |
| over a billion but less than 25 billion | | 31.8% | 34 |
| 25 billion or more | | 19.6% | 21 |
| would rather not say | | 8.4% | 9 |
| not applicable | | 18.7% | 20 |
| | | answered question | 107 |
| | | skipped question | 0 |






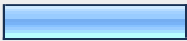

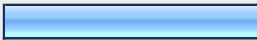

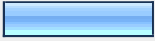

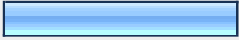
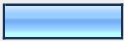
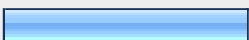
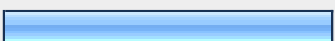
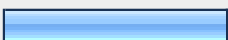

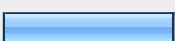
15. Are you male or female?





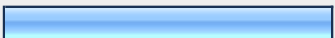


| | | Response Percent | Response Count |
|--------------------------|--|------------------|----------------|
| male | | 90.7% | 97 |
| female | | 9.3% | 10 |
| answered question | | | 107 |
| skipped question | | | 0 |

16. Which of the following professional degrees or certifications do you have? Please check ALL that apply.






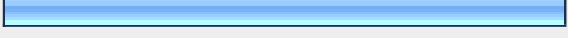
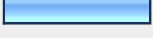
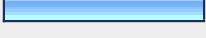
| | | Response Percent | Response Count |
|--------------------------|--|------------------|----------------|
| MBA | | 58.3% | 56 |
| PhD | | 2.1% | 2 |
| CFA | | 82.3% | 79 |
| CPA | | 9.4% | 9 |
| JD | | 0.0% | 0 |
| CMT | | 2.1% | 2 |
| answered question | | | 96 |
| skipped question | | | 11 |

17. A list of events that CFA Society of Columbus has sponsored over the past few years are listed below. Please check ALL of the events that you attended.





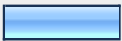

| | | Response Percent | Response Count |
|---|---|------------------|----------------|
| golf and/or tennis outing |  | 45.3% | 39 |
| Andrew Karolyi - What Factors Drive Global Stock Returns |  | 29.1% | 25 |
| Luciano Siracusano - Fundamentally Weighted Indexes |  | 17.4% | 15 |
| CFA Charter Award Ceremony - Travis Carr - Subprime's Effects |  | 26.7% | 23 |
| Candidate information night |  | 7.0% | 6 |
| Gary Clayton-Prediction Using Everyday Economics Statistics |  | 19.8% | 17 |
| Stanley Workshop luncheon |  | 2.3% | 2 |
| Richard Hokenson-Economic and Investment Implication of Global Population |  | 27.9% | 24 |
| Dillion, Li, Madich & Upton - Financial Markets Outlook |  | 31.4% | 27 |
| Career Resources night |  | 16.3% | 14 |
| Jonathan Stokes - Ethics Training refresher |  | 20.9% | 18 |
| Keith Black - Searching for the Hedge Fund Bubble |  | 25.6% | 22 |
| CFA after exam party |  | 12.8% | 11 |
| Fred Speece Jr. - The Art of Investing |  | 26.7% | 23 |
| Helmut Henschel - Neuroscience of Investment Behavior |  | 36.0% | 31 |
| Antonio Morello - Income Efficient Frontier |  | 24.4% | 21 |
| Office Depot |  | 5.8% | 5 |
| Robert Dannhauser - Charter award ceremony |  | 18.6% | 16 |

| | | | |
|---|--|--------------------------|-----------|
| Gillian Tett - Live Audiocast - Central Bankers |  | 1.2% | 1 |
| John Micklitsch - Investing in China |  | 25.6% | 22 |
| bowling event |  | 9.3% | 8 |
| Stalla CFA exm prep workshop |  | 5.8% | 5 |
| Gregory Valliere - History in the Making - A View from Washington |  | 36.0% | 31 |
| Phillip Roth - A Technical View of the Markets |  | 25.6% | 22 |
| Jonathan Hook - OSU Endowment |  | 38.4% | 33 |
| | | answered question | 86 |
| | | skipped question | 21 |

18. In the coming year, are you likely to attend some of the events that are listed below? Please check ALL that apply.

| | | Response Percent | Response Count |
|-----------------------------|--|--------------------------|----------------|
| golf and/or tennis outing |  | 40.0% | 40 |
| lunch speaker(s) |  | 92.0% | 92 |
| CFA workshop(s) |  | 33.0% | 33 |
| wine tasting |  | 32.0% | 32 |
| candidate information night |  | 5.0% | 5 |
| dinner speaker(s) |  | 62.0% | 62 |
| bowling |  | 16.0% | 16 |
| career resource night |  | 22.0% | 22 |
| | | answered question | 100 |
| | | skipped question | 7 |

19. In the coming year, which ONE of the events listed below are you MOST LIKELY to attend?

| | | Response Percent | Response Count |
|-----------------------------|--|--------------------------|----------------|
| golf and/or tennis outing |  | 10.6% | 11 |
| lunch speaker(s) |  | 65.4% | 68 |
| CFA workshop(s) |  | 6.7% | 7 |
| wine tasting |  | 2.9% | 3 |
| candidate information night | | 0.0% | 0 |
| dinner speaker(s) |  | 12.5% | 13 |
| bowling | | 0.0% | 0 |
| career resource night |  | 1.9% | 2 |
| | | answered question | 104 |
| | | skipped question | 3 |

20. A list of possible new events/presenters for next year are listed below. Please check ALL of the ones you might be interested in attending.

| | | Response Percent | Response Count |
|------------------------------|--|--------------------------|----------------|
| sell side analyst |  | 31.7% | 33 |
| market technician |  | 44.2% | 46 |
| behavioralist |  | 66.3% | 69 |
| academic |  | 43.3% | 45 |
| portfolio manager |  | 61.5% | 64 |
| market strategist |  | 71.2% | 74 |
| economist |  | 69.2% | 72 |
| company management |  | 33.7% | 35 |
| buy side analyst |  | 37.5% | 39 |
| politician/political analyst |  | 56.7% | 59 |
| | | answered question | 104 |

21. Of all of the possible new events/presenters for next year, which ONE event are you most likely to attend?

| | | Response Percent | Response Count |
|------------------------------|--|--------------------------|----------------|
| sell side analyst | | 0.9% | 1 |
| market technician | | 0.9% | 1 |
| behavioralist | | 22.6% | 24 |
| academic | | 1.9% | 2 |
| portfolio manager | | 10.4% | 11 |
| market strategist | | 28.3% | 30 |
| economist | | 18.9% | 20 |
| company management | | 4.7% | 5 |
| buy side analyst | | 3.8% | 4 |
| politician/political analyst | | 7.5% | 8 |
| | | answered question | 106 |
| | | skipped question | 1 |

22. In addition to the events and speakers that are listed in the previous questions, what other types of events or activities would you like to see at future meetings?

| | | Response Count |
|--|--|--------------------------|
| | | 12 |
| | | answered question |
| | | 12 |
| | | skipped question |
| | | 95 |

23. For lunch meetings and speakers, please rank your first through fifth preference for a meeting location using the grid below. If a listed location is your first choice, please check the first choice column. If a listed location is your least preferred choice, please check the fifth choice column.

| | First Choice | Second Choice | Third Choice | Fourth Choice | Fifth Choice | Rating Average | Response Count |
|-------------------------------------|--------------------------|-------------------|-------------------|-------------------|-------------------|----------------|----------------|
| downtown | 70.5% (74) | 8.6% (9) | 6.7% (7) | 9.5% (10) | 4.8% (5) | 1.70 | 105 |
| northeast (Polaris area) | 19.4% (18) | 12.9% (12) | 26.9% (25) | 29.0% (27) | 11.8% (11) | 3.01 | 93 |
| Ohio State | 2.1% (2) | 57.9% (55) | 25.3% (24) | 11.6% (11) | 3.2% (3) | 2.56 | 95 |
| Northwest (Dublin/Worthington area) | 9.3% (9) | 22.7% (22) | 30.9% (30) | 29.9% (29) | 7.2% (7) | 3.03 | 97 |
| OTHER | 3.4% (2) | 5.2% (3) | 12.1% (7) | 13.8% (8) | 65.5% (38) | 4.33 | 58 |
| | <i>answered question</i> | | | | | | 106 |
| | <i>skipped question</i> | | | | | | 1 |

24. If you indicated in the previous question that your First Choice for lunch meetings and speakers would be somewhere other than the choices given, please tell us where you would prefer to have these meetings.

| | Response Count |
|--|--------------------------|
| | 6 |
| | <i>answered question</i> |
| | 6 |
| | <i>skipped question</i> |
| | 101 |

25. If lunch meetings and speakers were held at the location you have indicated a preference for in the previous question(s), would you be more likely to attend?

| | | Response Percent | Response Count |
|-------------------------|--------------------------|------------------|----------------|
| yes- definitely | | 62.5% | 65 |
| yes - maybe | | 26.9% | 28 |
| no - it wouldn't matter | | 10.6% | 11 |
| | <i>answered question</i> | | 104 |
| | <i>skipped question</i> | | 3 |

26. For dinner meetings and speakers, please rank your first through fifth preference for a meeting location using the grid below. If a listed location is your first choice, please check the First Choice Column. If a listed location is your least preferred choice, please check the Fifth Choice column.

| | First Choice | Second Choice | Third Choice | Fourth Choice | Fifth Choice | Rating Average | Response Count |
|-------------------------------------|--------------------------|-------------------|--------------|---------------|-------------------|----------------|----------------|
| downtown | 38.6% (39) | 18.8% (19) | 17.8% (18) | 17.8% (18) | 6.9% (7) | 2.36 | 101 |
| north (Polaris area) | 36.1% (35) | 13.4% (13) | 18.6% (18) | 22.7% (22) | 9.3% (9) | 2.56 | 97 |
| Ohio State | 5.1% (5) | 42.9% (42) | 30.6% (30) | 18.4% (18) | 3.1% (3) | 2.71 | 98 |
| Northwest (Dublin/Worthington area) | 24.0% (24) | 26.0% (26) | 22.0% (22) | 22.0% (22) | 6.0% (6) | 2.60 | 100 |
| OTHER | 6.6% (4) | 3.3% (2) | 13.1% (8) | 14.8% (9) | 62.3% (38) | 4.23 | 61 |
| | <i>answered question</i> | | | | | | 105 |
| | <i>skipped question</i> | | | | | | 2 |

27. If you indicated in the previous question that your First Choice for dinner meetings and speakers would be somewhere other than the choices given, please tell us where you would prefer to have them.

| | Response Count |
|--|--------------------------|
| | 7 |
| | <i>answered question</i> |
| | 7 |
| | <i>skipped question</i> |
| | 100 |

28. If dinner meetings and speakers were at the location you have indicated a preference for in the previous question(s), would you be more likely to attend?

| | | Response Percent | Response Count |
|-------------------------|--|--------------------------|----------------|
| yes - definitely | | 40.6% | 43 |
| yes - maybe | | 52.8% | 56 |
| no - it wouldn't matter | | 6.6% | 7 |
| | | answered question | 106 |
| | | skipped question | 1 |

29. In a typical year, about how many CFA Society of Columbus events do you usually attend?

| | | Response Percent | Response Count |
|----------------------|--|--------------------------|----------------|
| none | | 14.3% | 15 |
| one or two | | 24.8% | 26 |
| three or four | | 31.4% | 33 |
| five or more | | 29.5% | 31 |
| | | answered question | 105 |
| | | skipped question | 2 |

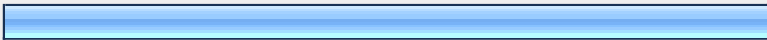
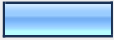


30. Of all the events that you have attended, which ones were you the MOST PLEASED with and why? Please think of at least two.

| | | Response Count |
|--|--|--------------------------|
| | | 46 |
| | | answered question |
| | | skipped question |
| | | 61 |

31. Of all the events that you have attended, which ones were you the LEAST PLEASED with and why? Please think of at least two.

| | | Response Count |
|--------------------------|--|----------------|
| | | 37 |
| <i>answered question</i> | | 37 |
| <i>skipped question</i> | | 70 |

32. Why do you usually come to CFA Society of Columbus meetings? which ONE of the following reasons motivates you the MOST?

| | | Response Percent | Response Count |
|--------------------------|---|------------------|----------------|
| hearing speakers |  | 84.3% | 86 |
| networking opportunities |  | 11.8% | 12 |
| socializing |  | 2.9% | 3 |
| free meal |  | 1.0% | 1 |
| OTHER | | 0.0% | 0 |
| <i>answered question</i> | | | 102 |
| <i>skipped question</i> | | | 5 |

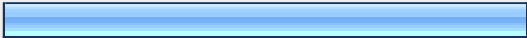


33. If you indicated that there was another reason why you usually attend CFA meetings other than the choices given in the previous question, please tell us why you usually attend.

| | | Response Count |
|--------------------------|--|----------------|
| | | 2 |
| <i>answered question</i> | | 2 |
| <i>skipped question</i> | | 105 |



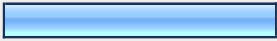
34. Please rank your meeting time preferences below. For the time that you prefer the most, please select the First choice column. For the time you prefer the least, please check the Fourth choice column. Please also check your preferred choices Two and Three.

| | First choice | Second choice | Third choice | Fourth Choice | Rating Average | Response Count |
|------------------|--------------------------|-------------------|-------------------|-------------------|----------------|----------------|
| 7-8 AM breakfast | 8.5% (8) | 42.6% (40) | 31.9% (30) | 17.0% (16) | 2.57 | 94 |
| noon lunch | 76.7% (79) | 15.5% (16) | 6.8% (7) | 1.0% (1) | 1.32 | 103 |
| evening dinner | 15.3% (15) | 38.8% (38) | 43.9% (43) | 2.0% (2) | 2.33 | 98 |
| weekends | 1.2% (1) | 5.8% (5) | 11.6% (10) | 81.4% (70) | 3.73 | 86 |
| | <i>answered question</i> | | | | | 103 |
| | <i>skipped question</i> | | | | | 4 |

35. Please indicate how you currently view the relationship between CFA Institute and your local society by checking one of the following statements that best represents your opinion.

| | | Response Percent | Response Count |
|---|--|------------------|----------------|
| I currently view my local society as an extension (or franchise) of CFA Institute into my local investment community. |  | 57.7% | 60 |
| I currently view my local society as an organization independent of CFA Institute. |  | 5.8% | 6 |
| I currently view my local society as somewhere between an extension of CFA Institute and an independent organization. |  | 36.5% | 38 |
| | <i>answered question</i> | | 104 |
| | <i>skipped question</i> | | 3 |

36. Please indicate how you currently think that the relationship between CFA Institute and your local society SHOULD be by selecting one of the following statements.

| | | Response Percent | Response Count |
|---|--|------------------|----------------|
| I think my local society should be an extension (or franchise) of CFA Institute into my local investment community. |  | 69.2% | 72 |
| I think my local society should be an organization independent of CFA Institute. |  | 1.0% | 1 |
| I think my local society should be somewhere between an extension of CFA Institute and an independent organization. |  | 29.8% | 31 |
| <i>answered question</i> | | | 104 |
| <i>skipped question</i> | | | 3 |

37. Where should CFA Institute and/or your local society prioritize resources to help you and other members in your local investment market during the current financial crisis? For the statements below, please check the column First Priority for the one that you feel is of highest priority and the column Fourth Priority for the one which you would give the lowest priority. Please also rank your Second and Third Priorities as well.

| | First Priority | Second Priority | Third Priority | Fourth Priority | Rating Average | Response Count |
|--|-------------------|-----------------|-------------------|-------------------|----------------|----------------|
| Increase local career development services, resources and networking activities. | 44.4% (44) | 32.3% (32) | 15.2% (15) | 8.1% (8) | 1.87 | 99 |
| Increase local educational offerings for members. | 52.0% (52) | 37.0% (37) | 8.0% (8) | 3.0% (3) | 1.62 | 100 |
| Increase advertising and brand awareness to key audiences in my local investment market. | 7.3% (7) | 20.8% (20) | 46.9% (45) | 25.0% (24) | 2.90 | 96 |
| increase local advocacy efforts. | 0.0% (0) | 12.8% (12) | 29.8% (28) | 57.4% (54) | 3.45 | 94 |
| <i>answered question</i> | | | | | | 103 |
| <i>skipped question</i> | | | | | | 4 |