

Press Kit

2013

NYSSA / At a Glance

Company Status	Non-Profit Organization Local Membership Society of CFA Institute
Year Founded	1937, Incorporated in 1940
Location	1540 Broadway, Suite 1010 New York, NY 10036
Employees	19
Members	9,000+
Products	Events and Courses
Constituency	Investment Professionals
Area of Reach	New York, New Jersey, Connecticut
Contact	Shauntay Jones (646) 871-3423 press@nyssa.org
Website	www.nyssa.org

About NYSSA

The New York Society of Security Analysts (NYSSA) has been a leading forum for the investment community since 1937. That year, a small group of security analysts decided to turn their casual lunch gatherings into a series of regular meetings. They held an organizational luncheon in a private dining room of the New York Chamber of Commerce. It was there that NYSSA was conceived, with a membership of approximately 20 analysts, including Benjamin Graham, the “father of securities analysis” and one of the most influential men in the history of finance. By 1939, the Society had grown to 82 members. Today, with more than 9,000 members, NYSSA is the largest of the 135 societies worldwide that comprise CFA Institute.

Mission

NYSSA was incorporated in 1940, and its purpose remains true to this day: to establish and maintain a high standard of professional ethics in the security analysis field; to improve analytical techniques; to foster the interchange of ideas and information among security analysts; and to promote proper understanding of the function of financial and security analysis and the operation of the security markets.

As a not-for-profit educational organization, NYSSA is committed to the promotion of best practices and the highest professional and ethical standards in the investment industry. NYSSA also strives to assist our members and other financial professionals in their career development.

How We Serve the Financial Community

NYSSA educates investment professionals on the forces that shape their business and provides resources to members and nonmembers alike to ensure that they succeed at all levels of their careers.

Here are just some of the resources NYSSA offers:

Career Resources

Affiliate Benefits*
Career Chat Series
Career Fairs
Data Terminals* (Bloomberg, Capital IQ,
Thomson One, Thomson Reuters)
Friday Career Coffee Series
Job Board* (in partnership with eFinancialCareers)

Education

CFA Exam Prep Courses
Professional Development Courses

Events

Conferences
Discounted/Complimentary Events*
High Profile Speaker Series
Market Forecasts
Seminars

Networking

Committee Participation*
Member Lounge*
Receptions (Networking/Social)
Toastmasters*

*Members Only

About NYSSA Members

NYSSA members represent an elite segment of the financial industry and are recognized as ethical, knowledgeable members of the investment decision-making community.

Total Members: 9,000+

Organization Types	% of membership*	Top 10 Titles	% of membership*
Money Mgmt/Asset Mgmt Firm	2.80%	Equity Analyst	12.1%
Other - Financial Services	19.4%	Portfolio Manager	12.0%
Investment Bank	12.5%	Consultant	9.5%
Other - Non-financial Services	11.2%	Fixed Income Analyst	8.1%
Bank	9.2%	Director/Managing Dir	6.2%
Self-employed	8.7%	Vice President	6.0%
Hedge Fund	6.3%	Risk Manager	4.8%
Broker Dealer/Wirehouse	5.5%	Asset Mgr/Money Mgr	4.7%
Private Equity	1.9%	Student	4.6%
Venture Capital	0.1%	Quant/Deriv Analyst	3.2%

Designations/Degrees	% of membership*	Side of Wall Street	% of membership*
CFA Charterholders	75.4%	Buy Side	43.9%
MBA	39.6%	Sell Side	18.9%
MS	13.3%	Other	37.2%
CPA	6.4%		
MA	5.0%		
FRM	4.4%		
PhD	3.8%		

*These figures are self-reported and do not represent 100% of NYSSA members.

Key Events in NYSSA's History

1937

NYSSA is founded; 20 analysts meet at the NY Chamber of Commerce

1940

Luncheon forums moved from Oscar's Old Delmonico to International Telephone & Telegraph Restaurant

1941

Luncheon forums held at Schwartz's Restaurant

1942

Forums expanded to three per week

1947

1 of 4 societies to form the National Federation of Financial Analysts Societies (NFFAS)

1948

Hosted first NFFAS Conference

1959

First headquarters established at 15 William Street

1972

Record number of attendees (541) in a single day for "International Monetary Developments" and "Proposed Solutions to the Natural Gas Crisis" on Jan 18

1979

Moved to 71 Broadway

1981

First Volunteer of the Year Awards

1987

50th Anniversary celebration included Golden Lecture Series

1996

Heloise S. Ham Educational Scholarship Fund established

First CFA Review course

SEMI Program launched

1998

Held first Market Forecast

2001

Lost offices on September 11; programs resumed in October

2002

Moved to 1601 Broadway

Launched Investment Research Challenge

2004

Panel presentation on "Value Investing: Celebrating the Life and Legacy of Benjamin Graham," founding member

2006

Moved to 1177 Avenue of the Americas

2007

Celebrated 70th Anniversary

2009

Launched Friday Career Coffee Series

2010

Moved to 1540 Broadway

Launched High Profile Speaker Series (first installment features James Bullard, President & CEO, Fed Reserve Bank of St. Louis)

2011

New Annual Reception Awards: Young Analyst, Benjamin Graham Distinguished Service, Furthering Research. Lifetime Achievement Award named for Irving Kahn.

Key Events in NYSSA's History *Continued*

2012

Celebrated 75th Anniversary at
Museum of American Finance

Board of Directors

Chairman

Kathy A. O'Connor, CFA, KJ Capital Management LLC

Vice Chairman

Mark Ukrainskyj, CFA, Covenant Asset Management

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Karen Sterling, PhD, CFA, Avalon Group Ltd.

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Nanci D. Morris, CFA, New England Retirement Group, NDM Management, LLC

Guy Rutherford, CFA, FVCM

Victor Ugolyn, Chairman, Wisdom Tree Trust

Alex Urdea, CFA, FRM, CMT, Solus LP

Ex-Officio

Amy Geffen, PhD, President and CEO, NYSSA

Please visit www.nyssa.org/governance to view biographies.

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