

## Society News

### *President's Letter*

In case you missed it, the CFA NC Society's Eighth Annual Forecast Dinner has come and gone. This year's dinner was sold out as 340 people gathered to hear David Tice, Dominic Wilson, and Tom Gallagher share their 2008 market outlook. I would like to thank our Special Events Chairman Zach Wagner, the Board, and countless number of volunteers who dedicated their time in putting this evening together. I would also like to express my appreciation to our guest panel, moderator, and our sponsors who made this event possible. Next year's dinner is scheduled for January 13<sup>th</sup>, 2009, and we hope to see you there.

I am also pleased to announce, that for the second consecutive year, the CFA NC Society has partnered with the three Business Journals of North Carolina to publish a special supplement titled "Investment Strategies in Turbulent Markets". The publication will reach affluent and influential business owners and managers across the state, and represents a wonderful opportunity for our membership to showcase their expertise in the areas of wealth management and financial planning. The insert will be distributed in all three papers on April 25, 2008.

This supplement offers our members and representative firms an opportunity to set themselves apart in the investment community by contributing articles via sponsorship to the publication. The CFA NC strongly encourages our membership to show support for our organization by placing an ad for your firm in the publication. By providing an ad, you are placing you and your firm in an environment that is highly credible and trusted.

Please contact Allison Shore with The Business Journal Serving the Greater Triad Area for details if you are interested in contributing at 336-370-2910. The CFA NC board is assembling a committee, co-chaired by Russ Kimbro- Public Relations Chairperson, and Mark Spaulding – Past President, to review and approve articles for submission.

Your contact information has been provided to the Business Journals, and you may be contacted with details regarding advertising opportunities. One of the account executives from your area listed below can provide further information about advertising. Please contact your area representative by March 1<sup>st</sup> if you would like to participate.

Thank you for your support of this endeavor, and I hope you enjoy a prosperous 2008.

Best Regards,

Brad F. Dalton, CFA  
President  
CFA North Carolina Society

*Charlotte Business Journal*  
Mark Levitt [mlevitt@bizjournal.com](mailto:mlevitt@bizjournal.com)  
704.995.4325

*Business Journal -Triad Area*  
Allison Shore [ashore@bizjournals.com](mailto:ashore@bizjournals.com)  
336.370.2910

*Triangle Business Journal*  
Kimberley Brame McGimsey  
[kbrame@bizjournals.com](mailto:kbrame@bizjournals.com)  
919.327-1006

### In this Issue

*\*President's Letter 2008  
Spring Business Journal  
Insert*

*\*Programs*

*\*CFA Scholarship  
Reimbursement*

*\*New CFA NC members*

*\*2007 Charterholders in  
North Carolina*

*\*Check out the Career  
Development link on the  
web: [Career Development](#)*

*Public & Private Equity Officer*

## CFA NC Society Spring Program Announcements

Our next scheduled program is on March 4 in Charlotte at the Omni Hotel and March 5 in Winston Salem for breakfast and lunch in Raleigh at the Capital City Club. Our presenter is Rep. Bill Daughtride. He will present "Challenges of a Changing North Carolina Economy". to CFA North Carolina Society members and guests.

A Rocky Mount native, Bill Daughtride has been a member of the North Carolina House of Representatives since 2003. He is also the president of Daughtride Gas & Oil Company of Rocky Mount and Daughtride Gas Company in Greenville and Roanoke Rapids providing over 150 jobs in Edgecombe, Halifax, Johnston, Nash, Pitt and Wilson counties. Currently, Representative Daughtride serves as vice chairman of the Southern Legislative Conference's Economic Development, Transportation and Cultural Affairs Committee. He is also running for North Carolina Treasurer.



Rep. Bill Daughtride

### Event details:

March 4th	Charlotte Omni Hotel	12 Noon
March 5th	Winston Piedmont Club	8:00 AM
	Raleigh Capital City Club	12 Noon

Speaker: **Bob Luck, CFA** Topic: "**Breaking the Short-term cycle**" **\*PD qualified\***



**April 15 Raleigh Capital City Club Lunch Mtg.**  
**April 16 Winston Piedmont Club Dinner Mtg.**  
**April 17 Charlotte Omni Hotel Lunch Mtg.**

You may register for any of these meetings from our website [www.cfanorthcarolina.org](http://www.cfanorthcarolina.org)  
Click on the events calendar and find the meeting to register for.

### Mark your calendars

- **May - Mark Killion, Managing Director World Industry Services, Global Insight**  
**May 20th Charlotte City Club lunch meeting**  
**May 21st Raleigh Capital City Club lunch meeting**
- **June 10, 2008 Jeff J. Deirmeier President & CEO CFA Institute Golf Tournament & Annual Meeting Grandover Resort, Greensboro, NC**

**A Reminder of our No Show Policy**

The CFA NC Society financially guarantees attendance to all of its events and meetings. When members do not attend, we are still obligated to pay for the plate, which is equivalent to the guest fee. The members or guests must contact our Society Office by noon on the Monday prior to the event to avoid a charge. You may alert us of the need to cancel at [admin@cfanorthcarolina.org](mailto:admin@cfanorthcarolina.org).

**New Walk Up Policy**

We welcome people to come to our programs even if they did not make a reservation. We know people have changes to their schedules and may have to miss a meeting for which they signed up. We will observe the following time-line for meetings:

\*12:00 - Official start of the meeting. Your name tag will be printed. We will have as many name tags as we have seats. Come get your name tag when you arrive.

\*12:15 - Open seating begins. If you are present and seats are available, they will be given out.

A reservation not used by 12:15 becomes an open seat.

**Guest Fee increase**

*As a result of increasing program costs, it will be necessary to raise our guest fees to \$40.00 beginning with the March program.*

*If you have any questions or comments regarding our Program policies, please send your comments to: [Admin@cfanorthcarolina.org](mailto:Admin@cfanorthcarolina.org).*

**New CFA North Carolina Society Members**

*We would like to welcome the following new members to our society*

Ashley Coleman

Jason M. Hoody

Matthew Smith, CFA

Ying Gao

Martha Davis Kelly

Lakshmiganapathi Yanamandra

**CFA SCHOLARSHIP Reimbursement**

CFA NC Society is offering up to 10 scholarships for the June 2008 exam. The scholarships are Reimbursements for candidates taking Level I, Level II or Level III. The program offers reduced costs for Candidates selected by CFA Institute member societies. Society scholars pay only US\$220. The fee is non-refundable and non-transferable. Scholarships cannot be deferred to another exam offering. Applicants must fulfill all CFA candidate [requirements](#). Contact [www.cfanorthcarolin.org](http://www.cfanorthcarolin.org) for details.

Applications are due March 1 to the CFA NC Society office:

**NEXT DEADLINE**

June 2008 exam:  
1 March 2008

[APPLY NOW](#) (PDF)

CFA NC Society  
3004 Oxbow Ct.  
Raleigh, NC 27613

**CFA North Carolina Society is proud to recognize our 2007  
Chartered Financial Analyst (CFA) Charterholders.**

<b>Edward Marc Abraham, II, CFA</b>	<b>Andrew Kevin Johnston, CFA</b>	<b>Norman Samuel Carew, CFA</b>
<b>Cynthia P. Bush, CFA</b>	<b>Mark Paul Kust, CFA</b>	<b>Thomas Lynn Loughrey II, CFA</b>
<b>Alisa Chintakananda, CFA</b>	<b>Spencer Langston, CFA</b>	<b>Varun M. Lumba, CFA</b>
<b>Sean Patrick Davis, CFA</b>	<b>William Curtis Markwell, CFA</b>	<b>Mark Nicholas Paccione, CFA</b>
<b>Elliott A. Dix, CFA</b>	<b>Michael DeVere Thomas, CFA</b>	<b>Daniel Lawrence Tolomay, CFA</b>
<b>Tara M. Hauk, CFA</b>	<b>Daniel J. Toomey, CFA</b>	<b>Michael Dow Taylor, Jr, CFA</b>
<b>J. Davis Hebert, CFA</b>	<b>Jeffrey Thomas Walwyn, CFA</b>	<b>Matthew Lowdermilk, CFA</b>
<b>George B. Hinton, CFA</b>	<b>Campbell M. Wilson, CFA</b>	<b>Brian Thomas Stewart, CFA</b>
<b>Matthew James Jensen, CFA</b>	<b>Huaiyu Xiong, CFA</b>	<b>Scott Thomas Matheson, CFA</b>

Questions or comments about CFA NC Society? Contact us: [admin@cfanorthcarolina.org](mailto:admin@cfanorthcarolina.org) 919.676.3577