



**100 women in
hedge funds®**

**Education Session No. 625:
From Trust to Loyalty - A Global Survey of What Investors Want**

May 24, 2016 at 4:30 PM
Cary, NC

How much do investors trust their investment managers? To restore their trust, we strive to provide transparency, the highest ethical standards and focus on performance; however, investor loyalty remains fragile. Why? The CFA Institute partnered with Edelman Berland to interview over 3,300 retail and 500 institutional investors and published a recent investor survey, "From Trust to Loyalty: A Global Survey of What Investors Want." What these investors said serves as the start of an important discussion about:

- (i) where we are succeeding in delivering what our clients need
- (ii) the differences between retail and institutional investors
- (iii) how far we have come in regaining trust following the Global Financial Crisis
- (iv) how our profession in the investment management industry continues to evolve

This 100WHF Educational event is organized in conjunction with the Spring Investment Institute Forum held by NC Investment Institute.

Event Details

Date: May 24, 2016

Time: 4 PM Registration.

We will begin *promptly* at 4:30 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Networking and cocktails will follow.

Hosts: CFA Society North Carolina and Alston & Bird LLP

Location: The Umstead Hotel and Spa

100 Woodland Pond Dr, **Cary**, NC 27513 - [Directions](#)

RSVP: [RSVP Now](#)

You may include a non-member guest with your RSVP.

If you have any questions about this event, please contact the [North Carolina Education](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission is free, but there is a \$25 charge if you register and do not attend, even if you cancel in advance. No-show proceeds will be donated to the beneficiary of 100WHF's most recent US philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted.

Biography

Lisa M. Plaxco, CFA, Head, CFA Program, CFA Institute

Lisa Plaxco leads the CFA Program Strategy for the CFA Institute to expand global access and build the investment management profession. She joined the CFA Institute in January 2016, following 21 years in the asset management field. Previously, Lisa served as Director and Portfolio Manager at First Quadrant L.P., an asset allocation boutique firm, with \$18 billion under management. In addition to her roles in investment research and portfolio management, she was the creator and head of an elite team that served as investment strategists for all firm assets. Lisa was awarded her CFA charter in 2004 and earned a B.S. in chemistry from the California Institute of Technology.

Lisa's prior contributions at CFA Institute include:

- Online Sample Exam Team (OSET) member, 2014-2015
- Senior Grader, CFA Level III Exam, 2014-2015
- Industry Mentor, CFA Investment Research Challenge, UCSB team 2014
- Mentor, CFA Level I Candidates, 2013-2014
- Author, CFA Level III Candidate Readings, 2004

Lastly, Lisa has been a court appointed special advocate (CASA) working on a volunteer basis with children in the foster system since 2013. In that role, she advocates for foster kids, as a partner with the social service and legal system, to assure that their best interests are served and their voices are heard.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)

100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 500 industry education events globally, connected more than 350 senior women through Peer Advisory Groups and raised over \$38 million for philanthropic causes in the areas of women's and family health, education and mentoring.