

PRESS RELEASE

CFA Societies Australia announces key appointments to Board of Directors in Sydney and Melbourne

Monday, 30 November 2020: CFA Societies Australia today announced key appointments to its Board of Directors in Sydney and Melbourne for three years from December, 2020, with full details outlined below.

The Board of Directors serve a critical leadership role in the CFA Societies by providing strategic direction to carry its mission and vision in Australia by coordinating the needs of society members with the rapidly changing environment of the investment industry. Its independent voice aims to promote the integrity and efficiency of the capital markets that underpin the investment profession and the broader Australian economy.

CFA Society Sydney

CFA Society Sydney is pleased to announce that Charles Wu, CFA, (see the photo below) has been appointed President following the Annual General Meeting. Mr Wu is the Deputy Chief Investment Officer and General Manager Defined Contribution Investments at State Super. “I am excited for this extraordinary opportunity to serve my fellow members, volunteers and the greater finance community as I begin my term as President of CFA Society Sydney. I look forward to deepening our impact locally and nationally,” said Mr Wu.

New appointments to the Board of Directors include:

- Raj Gohil, CFA, as Vice President. Mr Gohil is the Head of Macquarie Investment Management in Australia.
- James Cowper, CFA as Treasurer. Mr Cowper is the Director, Principle Advisory Services.
- Rein van Rooyen, CFA as Brisbane Director. Mr van Rooyen is the Head of Investment Performance & Operations, Group Governance, Q Super.

CFA Society Sydney would like to express its gratitude to departing board members, Anthony Serhan, CFA, Michael Brivulis, CFA, and Jake Koundakjian, CFA. The Society thanks them for their support while serving on CFA Society Sydney’s Board.

CFA Society Melbourne

CFA Society Melbourne has made the following appointments to the board with experienced industry leaders:

- Brett Elvish, CFA as Treasurer. Mr Elvish is the Founder and Director, Financial Viewpoint.
- Rob Fowler, CFA as Programming Chair. Mr Fowler is the former Chief investment Officer, HESTA.

CFA Society Melbourne thanks departing board members Graeme Bibby, CFA, Thomas Tam, CFA, William Nigro, CFA, and Leila Lee, CFA, for their service on the Board.

About CFA Societies Australia

CFA Societies Australia is part of the worldwide network of CFA Institute member societies that lead the investment profession globally by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. With Societies in Sydney, Melbourne and Perth, CFA Societies Australia represents the interests of over 3000 investment professionals through advocacy, education, events, and professional development.

About CFA Institute

CFA Institute, the global association of investment professionals, sets the standard for professional excellence and credentials and is a champion of ethical behaviour in investment markets and a respected source of knowledge in the global financial community. There are more than 170,000 CFA charterholders worldwide in 164 markets.

For more information visit www.cfas.org.au, or follow us on Twitter at @CFASocietiesAus, facebook at facebook.com/CFASocietiesAus or LinkedIn at CFA Societies Australia.

Charles Wu, CFA

