



# Welcome to the CAIA New Member Orientation and Update

We will start promptly at **9am EST**.

Please add your questions to the Q&A section, we will address them at the end of our session.

You can find a copy of the slide deck and a recording of this webinar on the CAIA website within 48 hours at

<https://caia.org/caia-infoseries>



Member Orientation  
February 2, 2022



The Global Mark of Distinction  
in Alternate Investments

# Agenda

- ❑ Welcome
- ❑ Association Update
- ❑ CAIA.org – Your Portal to Access
- ❑ Your CAIA Membership
  - Visibility
  - Continued Learning
  - Participation
- ❑ Q&A

# Introductions

Learn about your Member benefits,  
resources, networking opportunities,  
AND... how to access them.



**William Kelly**  
CEO  
CAIA Association



**Dianne Regnier**  
Member Relations Manager  
CAIA Association



**Aaron Filbeck, CAIA,  
CFA, CIPM, FDP**  
Managing Director  
CAIA Association



**Mario Valverde, CFA,  
CAIA**  
CAIA Member & SoCal  
**Chapter Executive**  
State Street Global  
Advisors SPDR ETFs



## Our Mission:

CAIA Association **seeks to improve investment and societal outcomes of capital allocation through professional education, transparency, and thought leadership** across all investor alternatives in our industry.

## In Action:

We are a member-driven organization representing professionals in 100 countries, advocating for the industry through **credential programs, events, publications, research,** and **thought leadership.**

**12,000** Members

**32** Global Chapters

**100** Countries Represented

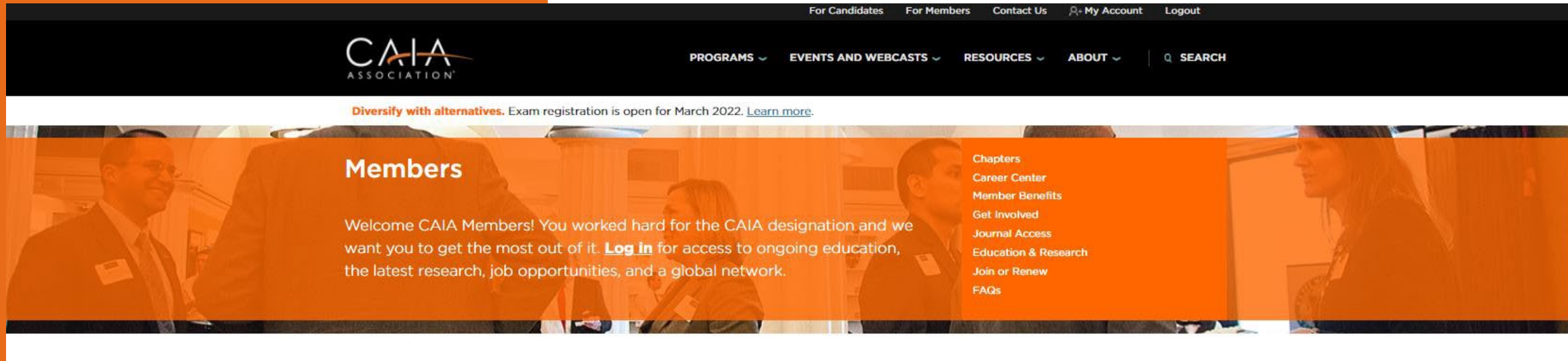
**20** Year Anniversary

Welcome to  
the CAIA  
Community.

YOU'VE EARNED IT!

**CAIA.org**

Your Portal to Accessing  
Member Benefits.



The screenshot displays the CAIA Association website. At the top, a dark navigation bar contains links for 'For Candidates', 'For Members', 'Contact Us', 'My Account', and 'Logout'. Below this, a secondary navigation bar features the CAIA Association logo, a search bar, and dropdown menus for 'PROGRAMS', 'EVENTS AND WEBCASTS', 'RESOURCES', and 'ABOUT'. A banner below the navigation bar reads 'Diversify with alternatives. Exam registration is open for March 2022. [Learn more.](#)'. The main content area is titled 'Members' and includes a welcome message: 'Welcome CAIA Members! You worked hard for the CAIA designation and we want you to get the most out of it. **Log In** for access to ongoing education, the latest research, job opportunities, and a global network.' To the right of the message is a list of links: 'Chapters', 'Career Center', 'Member Benefits', 'Get Involved', 'Journal Access', 'Education & Research', 'Join or Renew', and 'FAQs'. The background of the main content area is a photograph of people in a professional setting, overlaid with an orange tint.

CAIA  
ASSOCIATION

For Candidates For Members Contact Us My Account Logout

PROGRAMS ▾ EVENTS AND WEBCASTS ▾ RESOURCES ▾ ABOUT ▾ | SEARCH

Diversify with alternatives. Exam registration is open for March 2022. [Learn more.](#)

## Members

Welcome CAIA Members! You worked hard for the CAIA designation and we want you to get the most out of it. **Log In** for access to ongoing education, the latest research, job opportunities, and a global network.

- Chapters
- Career Center
- Member Benefits
- Get Involved
- Journal Access
- Education & Research
- Join or Renew
- FAQs

## Who Are CAIA Members?

*Industry &  
Employers*



**Banks:** HSBC, Citi, Credit Suisse, UBS, Barclays Capital, Deutsche Bank

**Consultants:** Cambridge Associates, New England Pension Consultants, Mercer, Willis Towers Watson

**Fund Managers:** Blackrock, Goldman Sachs, J.P. Morgan, Morgan Stanley, State Street

**Asset Allocators:** APG, Texas Teachers, Chicago Teachers, Ontario Teachers, CalPERS, Harvard Mgmt Co.

**Regulators:** U.S. SEC, MAS Singapore, SFC Hong Kong, FCA UK, CIMA Cayman



## **We're your partner...**

providing thoughtful and strategic opportunities that allow you to be confident in the alts industry, do more for your colleagues, and deliver a better client experience.

**YOU determine  
Your Membership's value.**



# Your CAIA Membership

- ✓ Visibility
- ✓ Continued Learning
- ✓ Participation

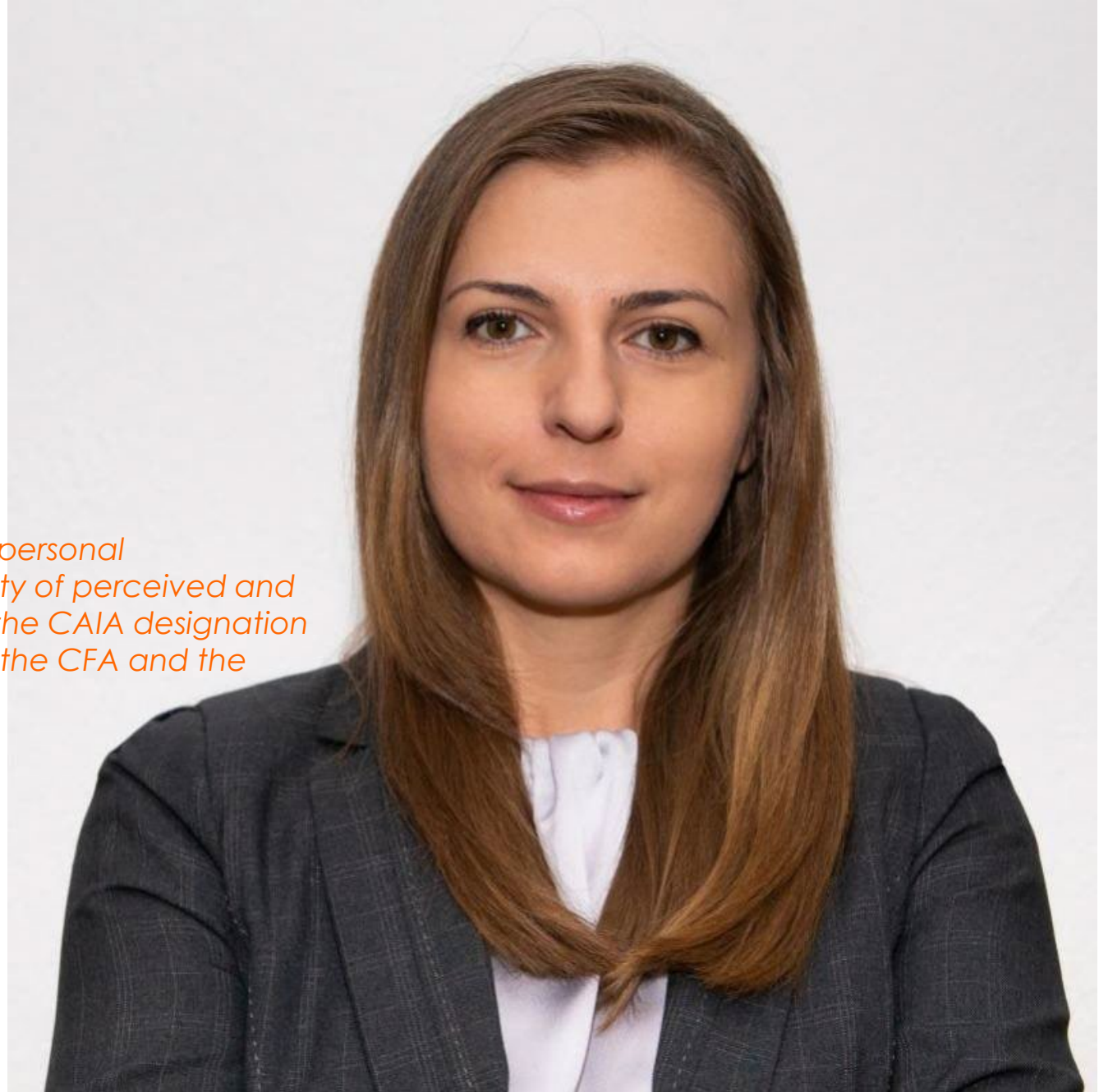


# Members like

Tatjana Bojkovska, CFA, CAIA, CIPM

*"Having accepted continuous professional and personal development as normal in adapting to the variety of perceived and unperceived changes and challenges, gaining the CAIA designation was a natural next step for me after completing the CFA and the CIPM programs."*

- ✓ Member Spotlight Featured
- ✓ Content Contributor
- ✓ First in Country CAIA recipient



Be Visible.

You Earned It. Now Show the World.

- + Physical Charter
- + Digital Badge
- + Member  
Spotlight
- + Career Center



# Visibility: CAIA Charter

Members  
Receive 20% off  
Customized  
Frame  
PromoCode:  
NEW22





# Visibility: Digital Badge

## Licenses & Certifications



CAIA Charterholder

CAIA Association

Issued May 2018 · Expires May 2020

## Education Section



CAIA Level II

CAIA Association

Issued Apr 2019 · No Expiration Date



CAIA Level I

CAIA Association

Issued Sep 2018 · No Expiration Date

<https://www.linkedin.com/school/caia-designation/people>





# Visibility: Member Spotlight

## Alex Botte, CFA, CAIA

[Chapters](#)  
[Career Center](#)  
[Member Benefits](#)  
[Get Involved](#)  
[Journal Access](#)  
[Education & Research](#)  
[Join or Renew](#)  
[FAQs](#)

I studied for the level 2 CAIA exam in mid-2016. At the time, I was an associate on the business development team at AQR Capital Management, a quantitative asset manager that offers alternative funds in liquid vehicles, among other products. As a member of the business development team, I was traveling to the offices of financial advisors talking about how adding liquid alternatives to a traditional stock/bond portfolio could lower risk and enhance both risk-adjusted and absolute returns. Over the prior three years, I was mentored by a senior person on the team, Bryan Johnson, who had earned both his CFA and CAIA charters and who I respected and looked up to (I still do to this day!). He encouraged me to go through both programs, and I'm so glad I did. The CAIA material provided more perspective on the liquid alternatives I was selling, including strategies like trend following and risk premia investing. It also gave me exposure to alternatives that I didn't know much about, but that many of my clients had exposure to in their portfolios -- things like real estate, private equity, and fine art.



Alex Botte, CFA, CAIA



Stephen Hull, CAIA



Jon Robinson, CAIA



Michael F. Beck, CAIA, CIPM,  
CFP, CPA



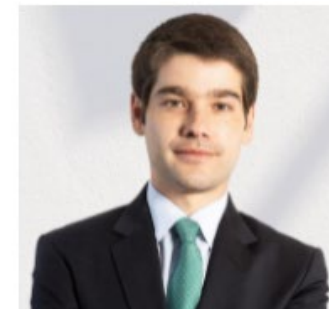
Klugy Mathurin, CFA, CPA,  
CAIA



John Greene, CAIA



Rushil Jeena, CAIA, CFA



Felipe Botero, CFA, CAIA



Elise Auer, CAIA  
CAIA London





# Visibility: Career Center



## CAIA Career Center Account Benefits



Post Your Resume



Apply For Jobs



Get Job Alerts

**Get Started!**

## Job Listings



**7,378**  
Job Listings



**244**  
Employers Hiring

# Continued Learning

## Your Alts Education Should Never End.

- + Blogs/Newsletters
- + Publications
- + Webinars
- + Educational Events



# Continued Learning: For Members, By Members.



Guest Author



Paisley Nardini, CFA, CAIA - Invesco

## Portfolio for the Future™

Research, Analysis, and Opinions for Better Investor Outcomes



## Give the People What They Want: How Wealth Managers Can Provide Crypto Exposure

By Simon Zais, CAIA, and Daniel Kerney, are both consultants with Capco. 1602 was a watershed year....

04 January 2022 | Access to Alternatives, Asset

# Continued Learning: Publications



## Excellence in Education

The latest thinking online and in print!

- Emerging Topics
- AI: An Analyst's Approach
- AI: An Allocator's Approach
- Follow-On Readings



# Continued Learning: Events & Webinars

## New Perspectives & Connections

CAIA Association hosts or sponsors more than 250 industry events and forums around the world!



Can't get there in person? Our InfoSeries webcasts provide online access to the latest thinking from CAIA experts.

**CAIA InfoSeries Webcasts**

# Participation

Get Involved. Expand Your Network.

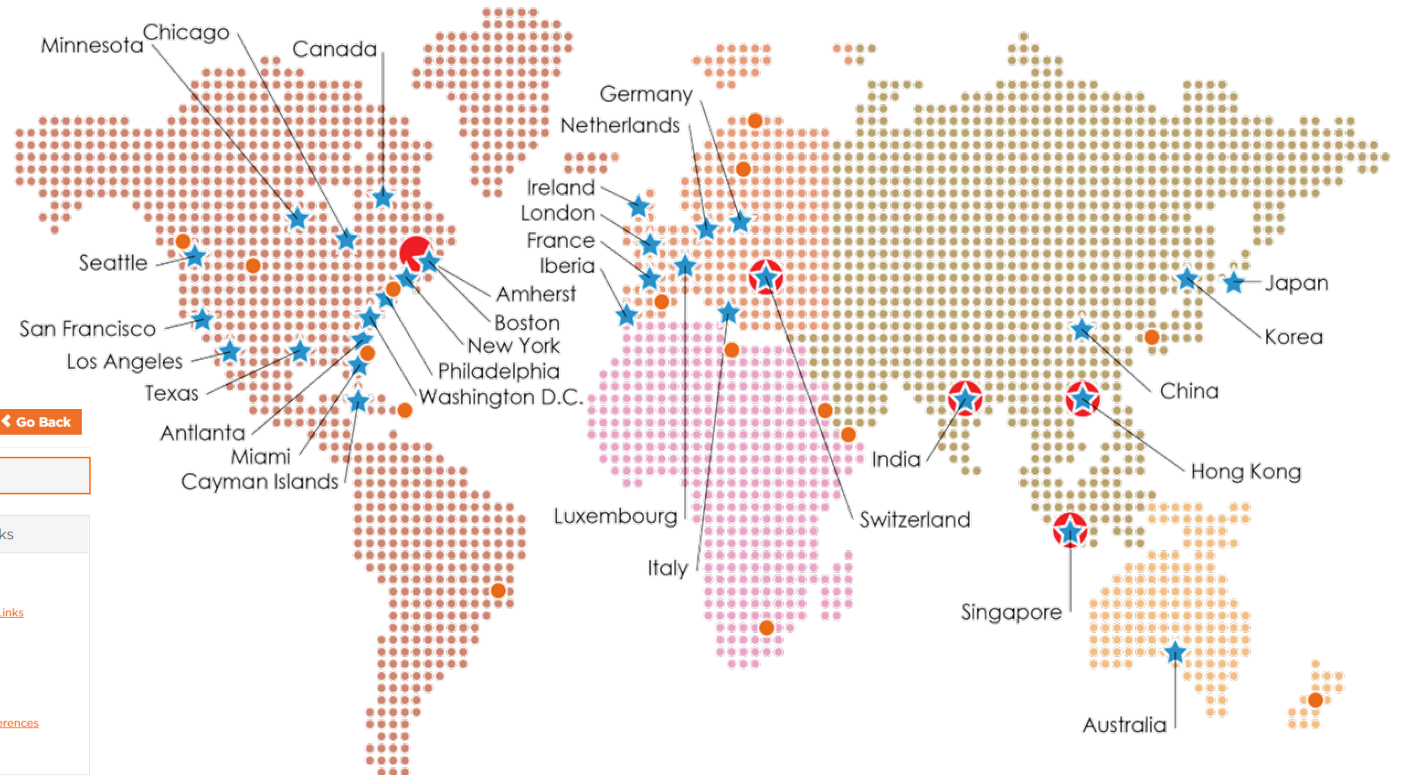
- + Chapters
- + Volunteering
- + Get Social



# Participation: Chapters

## Near or Far, You Belong.


With 32 Chapters including a Virtual Chapter – you can select up to 5 Chapters around the world to receive updates and info about!



### My Profile

[Go Back](#)

**Your Membership Status:** Non-Member / [Renew Membership](#) >



Amherst, MA 01002  
(413)549-3345  
[MemberTest@caia.org](mailto:MemberTest@caia.org)

[Member Directory](#)

**Profile Details** [Edit Name and Company Info](#)

**Name:** Member Test CAIA Account  
**CAIA ID:** 230229

**Address:** 11 Amity Street  
Amherst, MA 01002

[Click here to opt in to an online proctored exam](#)

**My Account Links**

- [My Profile](#)
- [Member Directory](#)
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- [My Invoices](#)
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- [My Membership](#)
- [My Events](#)
- [My Volunteer Interests](#)
- [My Communication Preferences](#)
- [Change My Password](#)

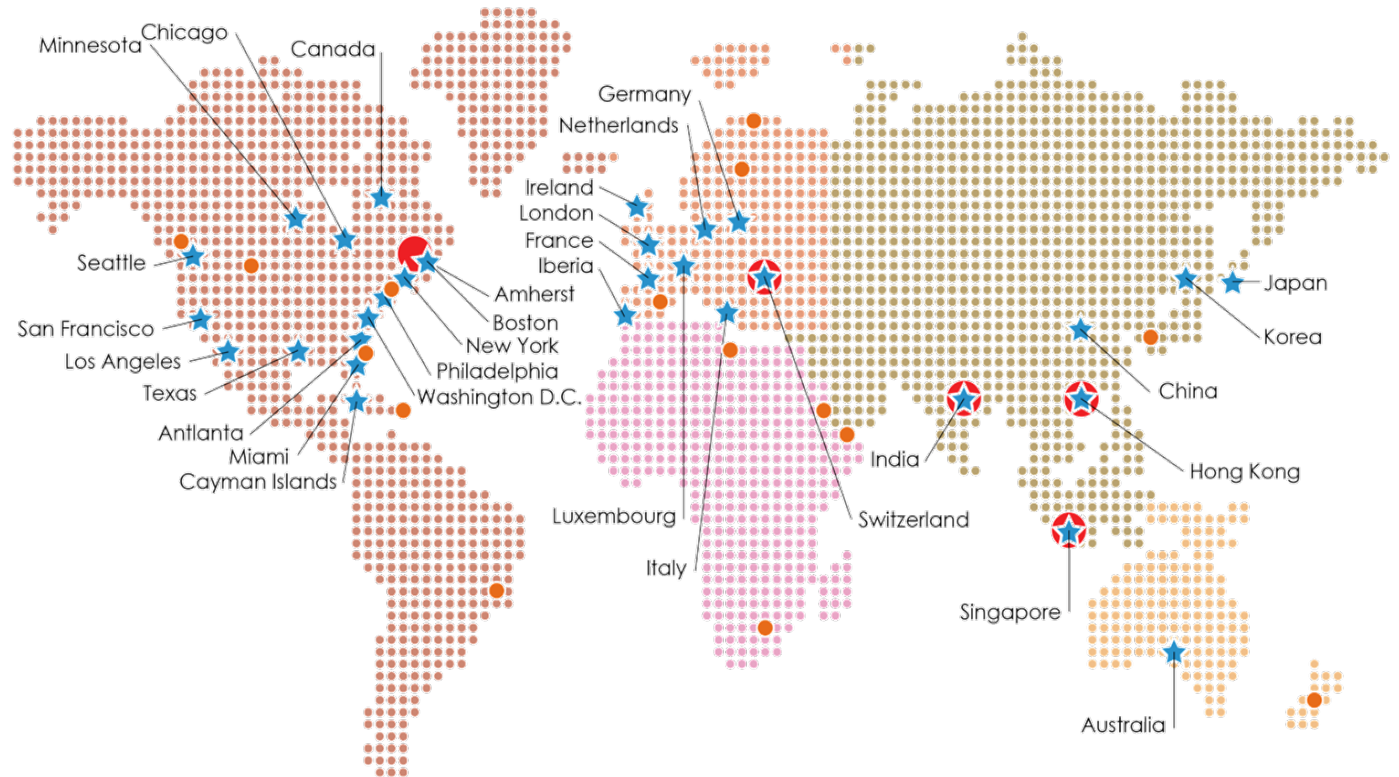
Questions? Ideas? Contact us at [chapters@caia.org](mailto:chapters@caia.org)



# Participation: Chapters



Near or Far, You Belong.



Questions? Ideas? Contact us at [chapters@caia.org](mailto:chapters@caia.org)



# Participation: Volunteering

## Share Your Expertise, Perspective and Voice.

- ✓ Candidate Support
- ✓ Grading Jamboree
- ✓ Curriculum Development
- ✓ Join a Chapter Committee

### Get Involved!


Log in to your CAIA profile and review all the possibilities under "My Volunteer Interests".

# Participation: Get Social

## Join the Conversation!

Following us on Social Media is easy, but adding your own posts creates a direct connection to your peers – instant networking!

Christian Evermann, CFA, CAIA commented on this

André Thormann • 2nd  
Equity Research Analyst @ Danske Bank | Lecturing Financial State...  
1d •  [+ Follow](#)

How can we comprehend this apparent Stock market contradiction and what does it imply for the future?

...see more

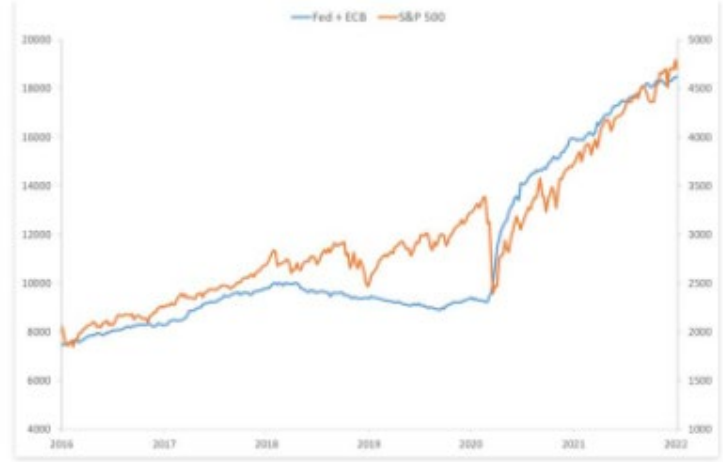











Figure 8. Combined values of the Fed and ECB balance sheets in billions of US dollars (left-hand scale) and the S&P 500 (right-hand scale), 2016-2022.

 Christian Evermann, CFA, CAIA and 83 others 4 comments

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Most relevant ▼

 Christian Evermann, CFA, CAIA • 1st  
Strategischer Portfoliomanager bei Bankhaus Neelmeyer - Zweigniederl...  
1d ...

It's not just rising (real) rates, the prospect of diminishing liquidity through QT also weighs on the stock market. The large indices were supported by a few rising constituents, whereas other stock ...see more



Q&A  
Thank You

## Stay Connected:



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@CAIAAssociation



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