



## NOTICE OF ANNUAL MEETING

When: **June 10<sup>th</sup> 2026 from 5:00 until 5:30 pm** (Advanced Registration Required)

Where: Cobb Energy Performing Arts Centre | 2800 Cobb Galleria Pkwy, Atlanta, GA 30339

Purpose: Consideration and voting upon:

- 1. Election of six (6) Officers for 1-year term ending June 30, 2027;**
- 2. One (1) Trustee, for 1-year term ending June 30, 2027;**
- 3. One (1) Trustee, for 2-year term ending June 30, 2028;**
- 4. Two (2) Trustees, each for 3-year term ending June 30, 2029;**
- 5. Other such matters as may properly come before the meeting or any adjournment thereof.**

Only those who are **Regular** Members of the CFA Society Atlanta as of **May 7<sup>th</sup>, 2026**, may vote. All Members – Regular, Affiliate and Local are encouraged to attend.

Please place your vote in advance of the meeting in one of three approved ways.

1. Online: [Annual Proxy FY27 \(click here to access\)](#) Members can log in using their username (charter number/member id) and password.
2. Completed, sign and email the attached proxy to [cathy@cfaatlanta.org](mailto:cathy@cfaatlanta.org)
3. Complete and sign the attached proxy and mail hard a copy to the following address:

CFA Society Atlanta - Attn: Cathy Ford | 4355 Cobb Parkway Suite J-533 Atlanta, GA 30339

If you have any questions, please contact Cathy Ford at [cathy@cfaatlanta.org](mailto:cathy@cfaatlanta.org) or 678-324-8474.

## **BIOGRAPHIES OF OFFICER NOMINEES**

### **President: Scott Roberts, CFA**

Mr. Roberts is the President of Belvedere Direct Lending Advisors where he leads the investment consulting services we provide our clients. Prior to Belvedere, Mr. Roberts was the Head of High Yield and Senior Portfolio Manager for Invesco's High Yield and Core Plus funds. During Scott's successful 21-year career at Invesco, he helped build the High Yield team to eighteen members and implement its investment and client engagement strategies. Scott skillfully guided the team in underwriting over \$30 billion of leveraged finance transactions during multiple business cycles. Prior to joining Invesco, Scott served as a High Yield Credit Analyst for Van Kampen Investments from 1998-2000. Scott earned a BBA in Finance from the University of Houston. He is a CFA charterholder and member of the CFA Institute and CFA Society Atlanta.

### **Executive Vice President: Stephanie Lang, CFA**

Stephanie is the Founder and Managing Partner of Armor Point Advisors, a boutique investment consulting firm that specializes in delivering customized investment solutions and strategic guidance to wealth management firms, family offices, non-profits, and asset managers ([www.armorpointadvisors.com](http://www.armorpointadvisors.com)). Previously, Stephanie served as Chief Investment Officer of HB Wealth (formerly Homrich Berg), where she led the firm's Investment Department and oversaw all aspects of the investment program, including asset allocation, manager selection across traditional and alternative strategies, and the research efforts for HB's internal private fund-of-funds. She also chaired the firm's Investment Committee.

With more than 28 years of experience in the investment industry, Stephanie's background spans portfolio management, investment research, and leadership roles across major financial institutions. Before joining Homrich Berg, she was a Portfolio Manager at Bank of America Private Bank, managing assets for individual and family trusts, charitable trusts, foundations, and retirement plans. Prior to that, she worked in equity research at SunTrust Robinson Humphrey, covering technology and media companies.

Stephanie is a sought-after speaker at industry events and contributor to the financial media. She has been quoted in Citywire, Barron's, and The Wall Street Journal, and has appeared on CNBC, Bloomberg, and Yahoo! Finance, among others.

She holds an MBA from Georgia State University and a BBA in Finance from the University of Georgia. Stephanie has served as Trustee and Chairwoman of Peachtree Alternative Strategies, a hedge fund-of-funds registered with the SEC. She is a member of the CFA Institute, serves on the Board of Trustees for CFA Society Atlanta, and has served on advisory boards for leading asset managers including PIMCO, J.P. Morgan, and iCapital.

### **Vice President Programs & Corporate Outreach: Juan Mendez, CFA**

Juan Méndez, CFA, is a Director and Portfolio Manager within BlackRock's Multi-Asset Strategies and Solutions (MASS) team, where he leads efforts in Portfolio Management Automation and oversees Fixed Income exposures. He is responsible for driving the development of scalable, automated investment workflows and analytics that enhance alpha generation and operational efficiency.

Prior to joining MASS, Juan was a Portfolio Manager on the Fundamental Fixed Income team, focusing on U.S. Investment Grade Credit. In this role, he contributed to alpha sourcing through fundamental credit analysis and trade implementation, while also driving the automation of portfolio construction and risk monitoring processes.

Earlier in his career at BlackRock, Juan served as a Taxable Fixed Income Product Strategist, specializing in multi-sector strategies for retail clients. Juan began his career at GE Capital as part of the Risk Management Program before moving to

Morgan Stanley Wealth Management, where he worked as an Investment Analyst within the Trust Investments group. He holds a degree from the University of Puerto Rico and is a CFA charterholder.

**Vice President Education & University Outreach: Duncan Hensley, CFA**

Duncan Hensley is an Atlanta native, graduating from Johns Creek High School before attending the Kelley School of Business at Indiana University where he majored in Finance and Accounting and minored in Spanish. After college, Duncan moved to Chicago and began his career with JPMorgan prior to returning home to Atlanta in 2021. During this time Duncan earned his CFA Charter.

Today Duncan is a Vice President supporting Middle Market companies across the state of Georgia helping deliver the power of the firm whether that be Credit Financing, Treasury solutioning or Transaction Development. In addition to his professional exploits, Duncan has been involved with the CFA Society of Atlanta for nearly five years, originally as a volunteer for the CFA Challenge before serving as a Board Trustee and running the CFA Society's Research Challenge the last three years. He has a passion for developing relationships and working with College Students and Young Professionals who are interested in earning the CFA Charter.

Outside of work and the CFA Society, Duncan is an Eagle Scout who earned the rank in Fall 2013. During his time in Scouting, he has participated in a variety of volunteer events across the state of Georgia. Duncan currently lives in Buckhead with his wife Jacquelyn and son James. In their free time you can find them enjoying Atlanta's vibrant restaurant scene, playing at the Atlanta History Center and Botanical Garden or traveling.

**Treasurer: Amanda Cogar, CFA**

Amanda is Director – Pension Investments at Delta Air Lines. Amanda helps lead the management and oversight of the defined benefit and defined contribution plans at Delta Air Lines. In this role, she works on governance, asset allocation, risk management, and implementation. Prior to joining Delta Air Lines in 2012, she was Assistant Vice President at Wilmington Trust, serving as portfolio manager for the firm's real asset and private real estate funds. Earlier in her career, Amanda served as a Portfolio Administrator at Balentine & Company, which was acquired by Wilmington Trust in 2002. She served as Treasurer of CFA Society Atlanta from 2011-2015, taught CFA exam review courses for several years before that, and participated in the CFA Institute's exam grading processes in Charlottesville from 2018-2019.

**Secretary: Gregory Goodson, CFA**

Greg Goodson is a Fixed Income Portfolio Specialist at Voya Investment Management covering the firm's Securitized portfolios and select Multisector accounts. Prior to Voya, he was a Financial Advisor and Portfolio Manager at a mid-sized RIA firm. Greg graduated from the University of Cincinnati with a degree in Finance.

Greg has been on the Board of CFA Society Atlanta since 2022 and was most recently co-chair of the Member Engagement and Volunteer Committee.

**BIOGRAPHIES OF NON-OFFICER TRUSTEE NOMINEES**

**Trustee (2029): Rex Macey, CFA, CFP**

Rex has over 30 years of experience as an investment professional. Before starting Red Tortoise an RIA mainly serving HNW families, he spent 11 years at Wilmington Trust. Rex taught part of the review course for the CFA for many years; authored numerous articles for the IMCA Investment and Wealth Monitor (including winning two writing awards for his work), edited that publication, served on the certification committee for the CIMA designation, served as a trustee for the Atlanta Society of Financial Analysts (now CFA-Atlanta on which he now serves on our strategic advisory committee).

Rex has appeared on CNBC, Wall Street Week, Fox Business News, and quoted in the Wall Street Journal (Google for more). He was awarded a patent related to incorporating mortality risk into the financial planning process. He earned a math degree from Vanderbilt and an MBA from the UNC's Kenan Flagler business school in Chapel Hill.

**Trustee (2029): Grace Moore, CFA, FRM, CQF**

Grace is Chief Investment Officer at Kenzie Lane Innovation, a single-family office, where she oversees capital allocation, manager selection, portfolio construction, and investment governance across public and private markets. Grace brings a broad investment perspective shaped by experience across corporate pension, endowment, wealth management, and family office platforms, including prior roles at Diversified Trust, the Georgia Tech Foundation, and UPS Corporate Pension. Her work has consistently focused on capital allocation and investment decision-making across asset classes.

Grace serves on the Investment Committee for the Community Foundation for Greater Atlanta and has been involved in education-focused nonprofit organizations, including FIRST LEGO League and Odyssey of the Mind. Originally from Taiwan, she earned a BBA in Finance from National Taiwan University and an MS in Finance from West Virginia University. She is a CFA charterholder and holds the FRM and CQF designations.

**Trustee (2028): Mary Cernilli, CFA**

Mary Cernilli is the Director of Investment Offerings at the National Christian Foundation (NCF). She manages NCF's liquid pools daily and leads the development and implementation of a comprehensive investment strategy. With over 25 years of industry experience, Mary has a demonstrated history of successfully managing portfolios across various asset classes for institutional clients.

Before joining NCF, she served as the Director of Investments at the Community Foundation for Greater Atlanta for three years, overseeing a \$1 billion investment portfolio. She also spent more than 13 years at Emory Investment Management as a Managing Director of Investments, where she played a key role in developing and implementing the investment strategy for the \$7 billion endowment.

Mary is both a Chartered Financial Analyst (CFA) and a Certified Public Accountant (CPA). She holds a BS in Accounting, Cum Laude, from Long Island University in New York. She volunteers at the food pantry for the St. Vincent de Paul Society, is a member of the Ziest Foundation's Investment Advisory Committee, and is currently the treasurer for the Huntwick Farms HOA.

**Trustee (2027): Liz Yin, CFA, FRM**

Liz serves as Chair of the Career Development Committee at CFA Society Atlanta, where she leads initiatives that empower members through mentorship, professional development, and leadership growth. In her professional capacity, she is a senior Quantitative Specialist and product leader, responsible for the lifecycle of advanced analytics and solution delivery, including product strategy, execution, and stakeholder management.

Over a 30-year career spanning banking, banking supervision, and product leadership, she has developed deep expertise in financial and risk modeling, capital planning, and model risk management. Liz also serves as a Senior Leader within Tony Robbins' organization, guiding participants to create clarity and sustained momentum in their professional and personal lives. As a mentor and advisor, Liz is particularly focus on helping immigrant professionals and small business owners break through limitations and build true wealth defined by both achievement and fulfillment.

# 2025-2026

## CFA SOCIETY ATLANTA LEADERSHIP

### OFFICER TRUSTEES

Rex Macey, CFA, CFP	President
Scott Roberts, CFA	Executive Vice President
Juan Mendez, CFA	Vice President Programs & Corporate Outreach
David Riley, CFA	Vice President Education & University Outreach
Amanda Cogar, CFA	Treasurer
Gregory Goodson, CFA	Secretary

### NON-OFFICER TRUSTEES

William Annis, CFA	Trustee; Past President; Nominations Chair
Robert Thompson, CFA, CAIA	Trustee; Past President
Charles Waterman, CFA, CAIA	Trustee; Past President
Duncan Hensley, CFA	Trustee; Research Challenge Chair
Liz Yin, CFA, FRM	Trustee; Career Development Chair
Michelle Cheng, CFA, FRM	Trustee; Member Engagement Chair
Stephanie Lang, CFA	Trustee; Programs Committee
Christian Wilson, CFA	Trustee
Sam King, CFA	Trustee
Joclyn Saldana, CFA	Trustee

# THIS PROXY IS SOLICITED ON BEHALF OF THE BOARD OF TRUSTEES

The undersigned certifies that he or she is a Regular Member, in good standing, of the CFA Society Atlanta and hereby appoints Rex Macey, CFA, CFP, President and Greg Goodson, CFA, Secretary, to represent him or her and to vote as designated below.

**1. For Officer, to serve a one (1) year term concurrent with the CFA Society Atlanta 2026 Fiscal Year:**

	<b>Agree</b>	<b>Disagree</b>	<b>Abstain</b>
President Scott Roberts, CFA	_____	_____	_____
Executive Vice President Stephanie Lang, CFA	_____	_____	_____
Vice President Programs & Corporate Outreach Juan Mendez, CFA	_____	_____	_____
Vice President Education & University Outreach Duncan Hensley, CFA	_____	_____	_____
Treasurer Amanda Cogar, CFA	_____	_____	_____
Secretary Gregory Goodson, CFA	_____	_____	_____

**2. For Trustee, to serve term as indicated:**

	<b>Agree</b>	<b>Disagree</b>	<b>Abstain</b>
Rex Macey, CFA, CFP (2029)	_____	_____	_____
Grace Moore, CFA, FRM, CQF (2029)	_____	_____	_____
Mary Cernilli, CFA (2028)	_____	_____	_____
Liz Yin, CFA, FRM (2027)	_____	_____	_____

**WHEN PROPERLY EXECUTED, THIS PROXY WILL BE VOTED AS DIRECTED BY THE UNDESIGNED REGULAR MEMBER. ABSENT SPECIFIC DIRECTION, THIS PROXY WILL BE VOTED IN FAVOR OF ALL PROPOSALS.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name