

Planning of 2023 Direct Access™ Programs Analyzing Exemplary Companies

Forum participants are invited to offer views of what will be most important to both investor and corporate decision-makers for the post-pandemic start of regularly scheduled Direct Access programs hosted by the [CFA Society New York](#) (“CFANY”) and its affiliated co-hosting Societies.

We expect to be able to schedule our first event for late February or March, with the subject company identified by early January, and follow with additional events every two or three months during the year. Companies will be selected for the launch year’s programs based on their ability to provide investment analysts with the opportunity to examine what many of you found useful in the Direct Access test program with Oshkosh Corporation: “*doing the right things the right way.*”*

Selection of companies for Direct Access will be the responsibility of a panel including representatives of the Forum and CFANY’s [Institutional Asset Management Group](#). More specific planning of each event, including careful definition of particular subjects to be addressed with the invited company and the selection of professional analysts to lead the live interview of company management, will be defined by an event-specific panel that includes representatives of the company.

In addition to your suggestions of exemplary companies and relevant issues to be addressed, we will also welcome your advice to guide our continuing refinement of the Direct Access programs to most effectively support

- the professional interests of members of CFANY and affiliated Societies in the demonstrated benefits of their skills,
- corporate management interests in the recognition of their effective use of investors’ capital to produce goods and services, and
- public interests in fair and open access to information needed for responsible investment decisions.

Thanking you in advance for any advice you may provide, we look forward to providing Direct Access programs that benefit you and the broader marketplace.

GL – December 5, 2022

Gary Lutin
Chairman, The Shareholder Forum

* See [November 12, 2020 Forum Report: Archived Video of Direct Access with Oshkosh Corporation Hosted by the CFA Society New York](#).