



The Municipal Forum of New York

-Established 1938-

www.themunicipalforumofnewyork.org

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The Municipal Forum of New York is excited to kick off the 2024-2025 year. The Forum has always sought to embrace best practices and traditions in the public finance sector and pass them on to the next generation of bankers, underwriters, advisors, bond attorneys, traders, analysts, insurers, and public sector finance officers. The Forum has also supported diversity, equity, and inclusion in its recruitment of our next leaders through the Urban Leadership Fellows Program (“ULF”), by giving a voice to a diverse set of current leaders in our industry, and by dedicating itself to improving our communities.

Last year, the Forum was pleased to host several speaker series events, along with the Annual Awards and Urban Leadership Fellows Dinner. The inaugural Holiday Party and Associate Board networking events were well attended and represent new ways the Forum is looking to expand our footprint and deliver value to our membership.

Last, but certainly not least, the 2024 ULF Program was once again a great success. More than 30 graduating seniors from 22 New York City high schools, representing a wide range of backgrounds, completed internships, and received college readiness support throughout the six-week program. The continuation of this program is essential for carrying out the Forum’s mission of providing opportunities to deserving young people throughout the City. Last year was the first year since 2020 where ULF alumni are in every year of college, which means nearly 120 students who have interned with our membership and partners are taking their internship experience with them to college and beyond.

The Forum and its members deliver valuable services to our sector and help provide for the future growth of both our industry and communities. Our programming and philanthropic efforts are made possible by the support of membership dues, fundraising events hosted throughout the year, and the support we receive from various member firms through the placement of ULF interns.

Urban Leadership Fellows Scholarship Program

As one of the main financial beneficiaries of the Municipal Forum’s activities, the ULF Program provides paid summer internships and college scholarships for New York City high school graduates. The program provides students with rich learning experiences through on-the-job training at various investment banks, rating agencies, law firms, and issuers.

Since the Forum began sponsoring the ULF Program in 1992, more than 800 young people have benefited from the training and financial support provided by the program. These students have largely come from underserved communities in New York City and represent diverse ethnic and socioeconomic backgrounds. In recent years, approximately two-thirds of the program’s high school graduates have come from low-income communities and have qualified for the free National School Lunch Program offered by the Department of Agriculture.

The Municipal Forum has provided the ULF Program with more than \$1.5 million in scholarship funding through alumni scholarships, book awards, the Robert Rosenberg Memorial Fund, the Ned Flynn Community Service Award, the Carey Gabay Education Scholarship, and the Alan Anders Scholarship Fund. In 2024 alone, the Forum provided

over \$100,000 of financial assistance which included merit based scholarships for 47 former ULF Program participants that have maintained GPA of at least 3.5, \$2,500 for the Carey Gabay Education Fund Award and \$2,000 for the Ned Flynn Community Scholarship Fund Award, as well as an additional \$15,000 awarded to students who had completed the program to help transition into college and pay for their books. **Your membership dues and generous donations support the Forum's continued funding of scholarships for these students.**

2024-2025 Programming

The Forum Board is planning a solid calendar of events for the 2024-2025 programming year. The current plan is to host our next in-person event in either December 2024 or January 2025. Please stay tuned for further details.

Membership Renewal

The Municipal Forum of New York is a 501(c)4 organization. The membership cost for Corporate Members is \$3,700. Membership dues provide access for 10 individuals to each of the year's events. The dates, times, and other information for each event will be communicated prior to each event. Individual Memberships can be renewed for a fee of \$50. Public Sector Members will continue to have access to the Forum's programming free of charge.

To renew your membership, please complete and email the attached form (Word format preferred) to the Membership Committee (cstavitski@roosevelt-cross.com and baptiste@chapman.com) by December 1, 2024.

Payments and Payment Options

This year, we are introducing the option to pay by Zelle if this is available to you/your firm. Please use the QR code that can be found on the next page if you wish to pay by Zelle.

We understand that Zelle may not be an option for some firms and individuals. Please contact the Membership Committee (cstavitski@roosevelt-cross.com and baptiste@chapman.com) if you wish to pay by ACH so that we can provide the correct account details.

Finally, we are making an effort to move away from using paper checks, but please contact the Membership Committee (cstavitski@roosevelt-cross.com and baptiste@chapman.com) if this payment method is necessary for you/your firm.

All payments are due by December 15, 2024. A W-9 form is attached for your records.

As always, the Board of Governors of The Municipal Forum of New York appreciates your continued support of our programs and we look forward to seeing you soon.

Sincerely,

The Municipal Forum of New York Membership Committee

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