

CWIM LEADER SPOTLIGHT



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WHAT IS YOUR CURRENT JOB TITLE / COMPANY AND WHAT DO YOU LIKE THE MOST ABOUT YOUR ROLE?

I am a Senior Vice President/Portfolio Manager at Regions Bank. My favorite part of my job is building relationships with clients and helping them find long-term solutions to their investment needs.

WHAT MOTIVATED YOU TO JOIN / SUPPORT THE COLLABORATIVE WIM INITIATIVE?

Because it is an amazing opportunity to bring women from across the world together to share ideas and encourage women to break through traditional workplace stereotypes, and not only succeed, but excel in the industry.

WHAT'S THE BEST ADVICE YOU'VE EVER HEARD?

Be your own self advocate. Do not wait around for someone else to make you happy or offer you your dream job. You have to take the initiative yourself but also ask for help along the way!

WHAT ARE YOU PASSIONATE ABOUT?

I am most passionate about helping others and empowering other women to see their potential. I love working with high school and college students, especially women, to show them that the sky is the limit but selfishly encourage them to pursue a career in wealth management.

WHAT IS YOUR ROLE WITH YOUR CFA SOCIETY? WHAT HAS BEEN THE MOST REWARDING EXPERIENCE FOR YOU?

I currently serve on the Board of the CFA Society of Alabama. I have served in all of the officer roles over the years and have now served as a Board member for over 10 years. The comradery and friendships I have developed has been so impactful on my life, but the most rewarding experience has been developing a Women in Wealth initiative for our society. I noticed at one of our board meetings a few years ago that I was the only woman on our board, and that discussion turned into creating programing and events in an effort to recruit more women not only into the CFA program, but also into the wealth management field.

WHAT PERSONAL EXPERIENCE HAS HAD THE BIGGEST IMPACT ON YOU?

I participated in an exchange student program in France when I was a junior in high school. Because I had studied the French language since I was five years old, I was sent to live with a family in a very small town in France while my cohorts were living it up in Paris. Navigating a foreign country for a month with a family whose only English was saying “chicken mcnuggets” and living in the woods for a week of that time with their daughter who was a “Scout De France”, similar to Girl Scouts but more like Boy Scouts, taught me that I am stronger than I thought and I can persevere through most anything!