

CWIM LEADER SPOTLIGHT



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**Board Member,
CFA Society Atlanta**

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

I am the Managing Partner at Practical Investment Consulting (PIC), an OCIO firm offering turnkey behavioral finance application in investment strategies and communication support, investment research support, third-party money manager due diligence, investment compliance support and back office solutions to independent financial advisory firms nationwide. I enjoy working with multiple RIA firms as I see different firm cultures. I particularly enjoy being a part of each firm's growth trajectory- the path and the process of growing from a small team to a large firm is a very fulfilling experience.

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

I was the past President of CFA Society Atlanta, a Board Member and Diversity and Inclusion Co-Lead. My most rewarding experience at the Society was being part of the team that started D&I initiative as a formal committee, with defined objective (we achieved the objective of 20% women members by Year 2020 and are aiming to achieve 25% by year 2025).

IF YOU WERE INDEPENDENTLY WEALTHY AND DIDN'T NEED TO WORK, HOW WOULD YOU SPEND YOUR TIME?

I would travel, meet new people, and see the world.

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

The idea/concept of connecting women from CFA societies all around the world is very appealing and rewarding. Collaborative WIM has enabled us to share, collaborate, support and build new friendships in a virtual world, which is amazing!

WOULD YOU RATHER LIVE IN A BIG CITY OR ON A FARM?

I am out and out a city girl :)

WHAT'S THE BEST ADVICE YOU EVER HEARD?

“Take the first step in faith. You don’t have to see the whole staircase, just take the first step.” Martin Luther King Jr.

WHAT 3 THINGS WOULD YOU BRING TO A DESERTED ISLAND AND WHY?

A bed, a bathroom and a phone that works. I am a glamour and not a camper so I would need these to be comfortable after a day touring the deserted island :)

WHAT ARE YOU PASSIONATE ABOUT?

I have been passionate about supporting and partnering with other other women. As a minority woman in finance and having lived in few countries globally, I’ve been involved in and experienced diversity my entire life. Joining CFA Society Atlanta, gave me an avenue to express my passion. My passion is driven by my curiosity about the far-reaching implications of diversity and getting people to see those connections.