

# 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'm a finance and investment director at a single family office in Nevada. We invest across global asset classes with a primary focus on Private Equity. What I love the most about my role is the breadth of opportunities and new learnings it brings me each day. Be it sitting down with a portfolio company to create a sustainability strategy for them or trying to figure out tax credits for another company the next day, there is always something new to learn and an opportunity to grow every day.

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

When I first joined a virtual Collaborative WIM "On the Same Page" session, I had no idea about Collaborative WIM or no expectation about the session itself. Well, hard to believe, that day, I found myself in a very candid and intimate conversation with four women, talking on how to step outside of our comfort zones, sharing very personal experiences! It felt so natural and so uplifting to be in that room; I felt heard and supported by some women whom I was seeing for the first time in my life. After that session, the more I got involved with Collaborative WIM, the closer it grew to my heart. Collaborative WIM is such a powerful community for women in finance. It created a whole new platform, a safe space like no other for people in investment management. I'm all about empowering other women and collaboration, so supporting CWIM and expanding its reach will be a priority for me going forward.

## **WHAT MADE YOU DECIDE TO PURSUE THE CFA CHARTER?**

I sat for my Level I exam back in 2013. At the time, it was just out of looking for a new challenge. I passed Level I that year, however, the next year we welcomed our daughter, which meant I did not have time to pursue the charter any more, trying to navigate being a full-time working mom. After we moved to the US, the first two years I did not have work authorization. So I thought to myself, what better time to prepare for the CFA and accomplish this goal, than this?! Plus, having the CFA charter would have helped me stand out among other candidates during my job search, so it was a no-brainer. Having the CFA Society Nevada by my side, going to events, meeting new people, and expanding my network also helped with the transition to my new country. CFA Program is a really challenging journey, yet so rewarding, and I'm really glad I pursued it

## **WHAT ARE YOU PASSIONATE ABOUT?**

A few years ago, I started painting with alcohol inks and discovered a passion for painting. I lose track of time when I'm painting and I feel so present, which is a rare feeling in this always "go-go-go" life. I have a small not-for-profit art business on Etsy/IG (@artbyjlan) where I sell my art and donate the proceeds into charitable causes.