

# CWIM LEADER SPOTLIGHT



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**CFP**

**CFA Society San Diego**

**Chief Investment Officer, Partner**

**Hoyle Cohen**

## **WHAT IS YOUR CURRENT JOB TITLE AND WHAT DO YOU LIKE MOST ABOUT YOUR ROLE?**

I serve as Chief Investment Officer at HoyleCohen, a registered investment advisory firm with \$2,74B in assets under management, 50+ employees and offices in San Diego, Santa Monica, Sacramento, and Phoenix. I'm inspired to work alongside a team of top-quality professionals committed to lifelong education and acting with the upmost integrity.

## **WHAT IS YOUR BIGGEST CAREER ACCOMPLISHMENT? WHAT ARE YOU MOST PROUD OF?**

Since joining HoyleCohen in 2008, our assets under management have grown about 7x. I was able to play a key role in architecting and developing our investment platform into what it is today- a robust offering of traditional investments and alternative strategies.

## **AS A PRESIDENT OF THE CFA SOCIETY SAN DIEGO, WHAT HAS BEEN THE MOST REWARDING EXPERIENCE FOR YOU?**

I've formed so many meaningful relationships through my volunteer work with CA Society San Diego. I hope to be remembered for having built a greater sense of community for our members. In 2019 we were selected as Most Outstanding Society in the 350-1000-member category by the CFA Institute based on our accomplishments in the following areas: strategic direction, governance & leadership, developing future professionals, delivering member value, building market integrity, professionalism & recognition, and professionalized operations.

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

It was my vision to create a national network of women in investment management that could help support, guide and inspire each other in business and life. I didn't realize how quickly interest would spread internationally! I'm deeply impressed by the hard work of our dedicated steering committee and excited as we look to the future!

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

I like it all. I've been in San Diego for 13 years, enjoying the city, ocean, proximity to the mountains, and great year-round weather. As a child, I spent time living on a farm in Virginia and in the suburbs on the north shore of Boston. While in college, I spent time in the back bay of Boston, New York City, and London.

## **WHAT IS ONE THING YOU WOULD LIKE THE COLLABORATIVE WIM NETWORK TO KNOW ABOUT YOU?**

I like meeting people and making introductions. Please reach out!