



Alicia Romo, CFA, Named Volunteer of the Month for July



Candidates for the CFA charter have been getting a helping hand for many years from Alicia Romo, CFA, our volunteer of the month for July.

Romo, a CFALA member for more than 15 years, has spent about half that time as a mentor in the review program and has been a coordinator for the Level One classes for the last two years. She also is involved in women's social networking events.

"CFALA is a great organization and my volunteering started with wanting to give back," Romo said.

"However, as things have gone along I've found that it's been very engaging and rewarding for me to meet other people in our field, both for personal and professional reasons. Like other volunteers, I've found that I've gotten a great deal out of volunteering and I've met some wonderful people."

Romo, whose career in finance spans almost 30 years, is Managing Director, Investment Portfolio – Corporate Treasury for MUFG UNION BANK in Los Angeles.

"I have always enjoyed finance and doing deals," she said. "I enjoy the complexities of the capital markets and how they have grown over time. Having worked on both the sell-side and the buy-side, there always seem to be new challenges where you have the opportunity to take your core skills and learn new ways to apply them."

Being a volunteer also has increased Romo's feeling of involvement with CFALA.

"Being actively involved means that I've been better able to see the society grow and increase the amount of activities and programs it offers, both professional and social," she said. "I encourage everyone to find a way to become more involved – it really pays off."