

Anil Kapoor, CFA, CPA, Named October Volunteer of the Month



Our October volunteer believes in helping younger folks who want to learn more about investing – and helping CFALA itself. Anil Kapoor is a former instructor in the USC/CFALA CFA review program, currently helps coordinate the local level competitions of the CFA Institute Research Challenge (IRC) and also serves on the CFALA board of governors.

“I really enjoy working with local students, providing them with exposure to some of our Southern California companies and helping them learn how to analyze companies from an investment standpoint,” Kapoor said.

Along with Ned Downes and Jitendra Motwani, Kapoor helps secure companies for students to analyze (Disney was the subject company for 2015), recruit mentors and invite local universities to participate in the Southern California competition. Winning teams at the local levels go on to IRC regional and global level competitions.

Kapoor, who joined CFALA in 2003 a year after receiving his charter, believes it’s important for charter holders to support the society.

“The CFA designation provides significant professional benefits to those who attain it, and I think we have an obligation to give back to the society,” he said.

Kapoor, who leads the research team at Clifford Swan Investment Counsel in Pasadena, began his career at Ernst & Young in New York City after receiving his BS in Accounting from State University of New York at Albany. He’s spent most of his career in Southern California but remains a loyal New York Jets fan.