



Boris Castillo, CFA, Named February Volunteer of the Month



Ethics and education are cornerstones of CFALA’s mission, and also what most attracted Boris Castillo, CFA, to the society.

Our Volunteer of the Month has been a Level One coordinator for the review program and for the fixed income series since joining CFALA in 2013.

Castillo was impressed by the emphasis on ethics he found in the review program – and in the society.

“The review program not only takes a rigorous approach toward finance and the capital markets, the ethics portion is very heavily weighted,” he said. “In this day and age, the fact that an organization would focus so highly on ethics is one of the reasons I was attracted to CFALA. I also like to help people along in their careers. You meet a lot of interesting people in the society that you wouldn’t otherwise meet, and learn things you otherwise wouldn’t. Talking to other members at the events is great – you get a fuller picture of what they do in the real world.”

Like others, Castillo sees many benefits in the networking opportunities that volunteering provides.

“You meet people who work for some of the most respected companies in the industry, which is pretty exciting,” he said. “Also, CFALA regularly schedules many interesting speakers, and it’s great to be able to hear their presentations on cutting edge research and techniques.”

Castillo, who recently obtained his CERTIFIED FINANCIAL PLANNER™ certification, has worked for a number of top-notch companies, including New England Financial, Wells Fargo, UBS and Xceed Financial Credit Union. He also has served as President of the Los Angeles chapter of the Ecuadorian-American Chamber of Commerce

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Was a Board Member, Vice President, and finally President of the Los Angeles chapter of the Ecuadorian-American Chamber of Commerce. Employee

Xceed Financial Credit Union

September 2012 – August 2014 (2 years)|Greater Los Angeles Area

New England Financial

Financial Representative

New England Financial

September 2011 – September 2012 (1 year 1 month)|Miami/Fort Lauderdale Area

Union Bank

Vice President, Senior Financial Advisor

Union Bank

April 2005 – March 2009 (4 years)|Greater Los Angeles Area

Wells Fargo Investments

Financial Consultant

Wells Fargo Investments

May 2002 – July 2004 (2 years 3 months)