



## **Santa Barbara Group Grows Due to Volunteers' Efforts**



CFALA's satellite society in Santa Barbara is prospering, thanks in large part to the efforts of four members, two of whom have already been honored and two of whom are September's volunteers of the month. They are Tricia Mills, CFA, and Ricardo Calderon, CFA.

Mills is Senior Vice President and Portfolio Manager at U.S. Trust, and Calderon is a Portfolio Manager at Montecito Bank & Trust. Together with Carol Olson and Ale Folguera, who were May's honorees, they have created a CFALA Community of Interest that now has a mailing list of more than 100 and membership of about 40.

"We've grown from being an extension of CFALA to having our own speakers and events," Mills said. "We've had a very strong response to virtually everything we have put on, the social calendar is also very well received, and we had good attendance at the annual general meeting."

The Santa Barbara area is attracting a growing number of investment industry professionals, Calderon noted.

"There are a wide variety of investment industry folks here," he said. "In addition to the banks and trust companies, there are alternative investment managers, private equity groups, and a number of different types of companies."

CFALA has pioneered the use of internal video feeds that enable Santa Barbara members to "attend" events in Los Angeles, and has been instrumental in helping the four honorees build the group, which is now two years old.

"Ale and Carol took the initiative in the beginning, then Ricardo and I came on board and helped," Mills said.

"CFALA has been very supportive in helping us with our agenda of creating a strong subchapter here in town," Calderon said.