



CFALA Names Bernadette Gilbert March Volunteer of the Month



It's only natural that CFALA should honor Bernie Gilbert for helping others – that's what she wants to do when she gets her CFA Charter.

Gilbert, who registers attendees at society events such as the forecast dinner and luncheon seminars and also helps the headquarters staffers, will be taking the Level 1 exam this June as part of her five-year plan to move into a new career.

“I’m probably the most non-traditional CFA candidate you can find,” Ms. Gilbert said. “I’ve been in the workplace for 22 years and now I’m making a career change at about the worst possible time as far as the financial industry is concerned.”

Ms. Gilbert has worked in the workforce and economic development field for 18 years, most recently as a Program Director at Los Angeles Valley College, where she managed contracts for the U. S. Department of Labor and the U.S. Department of Housing and Urban Development Department (HUD). But she’s always been interested in the investment field and plans to help women manage their finances.

“Getting my CFA Charter has become almost an obsession with me,’ she said. “I have great expectations about being able to help women understand the importance of being financially independent, and I’d eventually like to manage their portfolios. I’m especially interested in organizations that support my passion for helping women.”

Ms. Gilbert credits her husband Jim for encouraging her to pursue a new career, and cites Wall Street analyst Meredith Whitney and Jacqueline Novogratz, founder and CEO of the Acumen Fund as inspirations. The Acumen Fund is a non-profit global venture capital fund that uses entrepreneurial approaches to address the problems of global poverty.

For all that she does, and all that she plans to do, CFALA is pleased to honor Bernie Gilbert as March Volunteer of the Month.