



## **CFALA Names Nathan Palmer, CFA, Volunteer of the Month for March**



Continuing education is a prime focus of CFALA and the many great speakers and events enjoyed by members are due in part to the society's director of programming, Nathan Palmer, who is honored as volunteer of the month for March.

"It's not just me," said Palmer. "Our Communities of Interest are headed by a number of volunteers, all of whom are very much involved in programming. Our overall goal is to provide outstanding content and events for our members."

Palmer is also teaming up with other California CFA societies to sponsor an investment conference scheduled for this September in San Francisco that has attracted a number of marquee speakers, from the CIO's at CalPERs and CalSTRS to, the head of municipal strategies at PIMCO, among others.

"It's the first time all of the state's CFA societies have joined together to produce an investment conference for California," Palmer notes.

In conjunction with Tom Collimore, head of industry relations for CFALA, Palmer is also organizing a pilot program to bring the CFA's soon-to-be launched Investment Fundamentals Certificate, as well as classroom instruction sponsored by the CFALA, to its members in 2013.

"We think the certificate program is going to be huge benefit for professionals in the investment industry," Palmer said. "We know that most people who work in the industry are not going to pursue a CFA charter. The certificate program will go a long way toward improving the competency, professionalism and standard of ethics for all of those involved in the industry, and we want to make it a big success."

Palmer, who received his charter in 2007 and joined CFALA in 2008, is a Vice President and Portfolio Manager at Wilshire Associates. Prior to joining Wilshire, Nate provided investment advice to endowment, foundation and family office clients at Convergent Wealth Advisors. Previously, he managed the public market investment portfolios for the

endowment at the California Institute of Technology (Caltech) and for the defined benefit and defined contribution retirement assets at Intel Corporation.