



CFALA Names James Peters, CFA, April Volunteer of the Month



Education is a key component of CFALA's mission, and dozens of future financial industry leaders have benefitted from the work of James R. Peters, our volunteer of the month for April.

Peters, a Senior Investment Associate in Merrill Lynch's Private Banking and Investment Group working in Century City, wasted no time in becoming a volunteer after moving to Los Angeles in 2011. For the past two years he has played a major role in organizing the Las Vegas and Southern California portions of the CFA Institute Research Challenge, a global competition that tests the analytic, valuation, report writing, and presentation skills of university students. Local winners advance to regional and national competitions, and last year's finals were held in Omaha, where a local investor named Warren Buffett made the keynote address.

Ten area universities participated in the 2012 competition, which was won by The University of Southern California. The CFA Society of Orange County is co-sponsor of the event. Overall, nearly 2,500 students from over 546 universities in 45 countries participated in the 2011 challenge and learned best practices in equity research from leading industry experts.

"Volunteering is very fulfilling to me, and I enjoy working with students who are the next generation of financial practitioners," Peters said. "I had helped with the challenge in Nevada last year and I wanted to get involved with CFALA after I moved here, plus being new in town and not knowing anyone, I had plenty of time."

Peters, who received his CFA charter in 2009, served as secretary of the CFA Society of Nevada and helped bring the research challenge to that area. A 2002 graduate of the University of Nevada, Las Vegas, he has been with Merrill Lynch for eight years.

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