



## **Marvin Tong, CFA, Named July Volunteer of the Month**



Many charter candidates find the coursework leading up to the exams – not to mention the exams themselves – much tougher than they expected. Marvin Tong did, and decided to help those following in his footsteps.

“I was a little naïve at the time, but I realized quickly that this was a different animal and that I had to prepare in a different way,” Tong said. “I didn’t have a mentor to help me when I was taking the program, and I recognized that it would have been nice to get the lay of the land from someone who had already been through it.”

Tong, who joined CFALA in 2005, got his charter in 2006 and immediately began volunteering as a mentor for Level One candidates. For the past four years, he’s also acted as coordinator for the Level Two series and proctored at tests.

“I try to share some of the things that I went through and give the candidates tips – be sure to prepare carefully for the test, take really good notes – things that have worked for me and things that didn’t,” he said. “It’s a good way for me to give back.”

Tong, who also holds the CAIA designation, became interested in finance and investing while earning his B.S. in Management Science from the University of California San Diego. He now is a Project Manager with the Southern California Edison Company, overseeing all the investments in the Defined Benefit and Defined Contribution plans. He focuses on investment manager selection and asset allocation decisions for the plan trusts. Before joining SCE in 2003, Tong was a senior analyst at Mercer Investment Consulting where he specialized in analyzing mutual funds and conducting vendor searches for defined contribution plans.