CFA Society Los Angeles

Michael Wu, CFA, Named
April Volunteer of the Month

Managing individual client assets requires knowledge in a wide range of fields, and our April Volunteer of the Month works hard to provide CFALA members with the opportunity to learn. Mike Wu is co-chair of the Private Wealth Management Community of Interest.

“Our job is to bring interesting and educational speakers to our members, who are all in the private wealth management area,” Wu said. “Our overall goal is to help enhance the expertise of advisors who manage individual client assets, so we bring in speakers who are subject matter experts on economics, equities, bonds, taxes, insurance – anything that touches our members’ clients.”

A recent presentation featured Charles E. Bohlen, CFA, Chief Investment Officer at SFE Investment Counsel, who discussed what investors – institutions and individuals – are doing in the field of socially responsible investing.

“It was very timely, exactly the kind of presentation we like to have,” Wu said. “A lot of my clients are asking about socially responsible investing as they want to start investing with their hearts.”

A CFALA member since 2009, Wu obtained his charter in 2010 and began mentoring Level One candidates before becoming co-chair of the Private Wealth Management COI in 2011. The group has about 40 members and sponsors six events a year on average.

Wu volunteers “… because I want to give back. When I look back on my career, there have always been people who took looked out for me and mentored me. Now it’s my turn, and going forward I plan to do more mentoring.”

Currently a Vice President/Senior Investment Advisor at Wilmington Trust in Los Angeles, Wu previously worked in private wealth management at Deutsche Bank. He began his career as a business analyst at Citibank.