



E-Newsletter

February 2024

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The CFA Institute Research Challenge in Los Angeles

California State University, Fullerton (CSUF) fielded two teams at the local round of the 2024 CFA Institute Research Challenge in Los Angeles, and the Titan teams finished in first and second place. The team of Bryan Barton, Kyrstin Huxtable, Eric Ramos, Kenneth Sherb, and Blake Wong emerged victorious and they secured their advancement to the sub-regional competition where they will compete against universities from across the Western United States. If successful at the sub-regional, they will compete at the Americas Regional. Afterwards, it is on to Warsaw, Poland for the finals!

Their faculty advisor was Kelly Ko, CFA, and their mentor was Derek Derman. Presenting their comprehensive analysis and buy

recommendation on Air Lease Corporation, the team presented to a panel of esteemed judges from the investment community, including Warren Darakananda, CFA, CPA, Max Seeget, CFA, Deanna Adams, CFA, Ryan Ross, CFA, Richard Barger, CFA, Jason McGorman, CFA, and Nancy Xie, CFA.



First Place winners Team A Pictured Left to Right: Kyrstin Huxtable, Eric Ramos, Blake Wong, Kenneth Sherb, Bryan Barton, and Kelly Ko, CFA (Faculty Advisor).

Earning second place was another team from CSUF, consisting of Ryan Flores, Abtin Ghasemieh, Azeneth Morales, Sy Tien Nguyen, and Winston Nguyen. Following closely in third place was Cal State Dominguez Hills, represented by

Original Content

Christian McCormick, Alan Zuni-ga, Duyminh (Mingy) Ho, and Ke-nia Molina-Sandoval.



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Months of rigorous research, interviews, and presentation training preceded the competition for all teams. The students received hands-on mentoring and intensive training provided through the CFA Institute and CFA Society Los Angeles (CFALA) network, faculty advisors, and industry mentors. This financial analysis and presentation expanded participants' experience and helped establish a strong foundation for their future careers in finance through valu-

able connections with industry professionals.

A special thank you to our judges, graders, mentors, and attendees! Best of luck to CSUF at the sub-regional competition, and we are looking forward to next year!

YOUNG LEADERS COUNCIL

In an effort to provide member value to our youngest members, CFALA is working to establish a Young Leaders Council that will serve as a platform for CFALA's Millennial and Gen Z generations to build networks, contribute fresh ideas, share professional experiences, and develop content that is relevant to them.

The project is being led by CFA-LA board member Dagney Maseda and CFALA staff member Teagan Jarvis. The goal is to launch

YOUNG LEADERS COUNCIL CONT.

the council this quarter and hopefully host their first event in the second quarter. “We are looking to emulate the successes of other CFA societies such as New York and Boston who host Young Professional groups. We are looking for young professionals that will help shape what the society looks like. It would be great to have younger voices heard.”

Given the average age of a CFA-LA member, we need to give the perspective of younger CFA charterholders more consideration. The Young Leaders Council will give millennial and Gen Z members a chance to build skills that may be unique to a member who is less experienced in leadership, career development and facilitating professional relationships. Maseda added, “The events we envision are more than just social. Networking yes, but we plan to

also have speakers that address educational topics of specific interest to this cohort as well as career development soft skills.”

The formation of the council is still in its early stages. Maseda said, “We are still looking for young leaders to be on the council and shape the initial charter of this unique group. It would be great to pull in CFA candidate members as well.” For young professionals who have either recently attained their charter or are in the process of completing the curriculum, finding a way to get involved in CFALA can be an intimidating step. If you or someone you know is a young professional looking to contribute time and energy while developing meaningful leadership skills, being part of the Young Leader Council may be a great opportunity.

For more information on the formation of the council, please contact **Teagan Jarvis** at teagan@cfala.org.

Curated Content

Curation by Stuart Fujiyama, CFA and Sona Shahinian

CFA Institute Outlines Policy Recommendations for “Finfluencer” Social Media Content

Content that is accessible, informative, and engaging is driving Gen Z investors to turn to financial influencers, or “finfluencers” for guidance on investment decisions. “However, our research shows that influencer content often lacks sufficient disclosures,” said Rhodri Preece, CFA, Senior Head of Research at CFA Institute. In this press release, Preece summarizes new research on and policy recommendations for finfluencer content on social media platforms.



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How to Invest for Beginners (Step by Step)

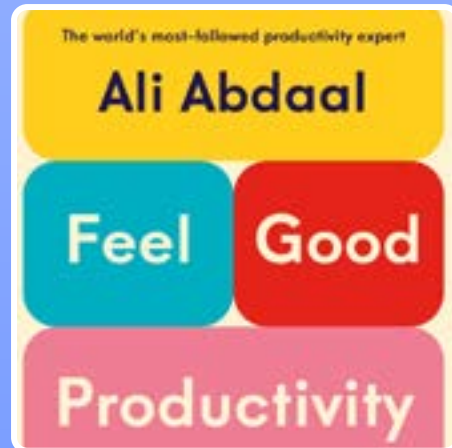
Attorney and personal finance expert Erika Kullberg and Personal Finance Club founder Jeremy Schneider guide viewers through the basics of investing. According to the CFA Institute report on influencer appeal, Kullberg posts primarily on Instagram, and is among the most followed influencers with 4.3 million followers.

Curated Content

Curation by Stuart Fujiyama, CFA and Sona Shahinian

If I Wanted to Be a Millionaire Before 30, I'd Do This

London-based author and doctor - turned - productivity expert Ali Abdaal shares his top five lessons from how he became a millionaire. Abdaal posts primarily on YouTube and has 3.9 million subscribers.



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From Loud Budgeting to Girl Math, Here's What You Should Know Before Taking Financial Advice from TikTok

Jessica Dickler, personal finance writer at CNBC describes how the trendiest financial advice is increasingly born on TikTok, with the hashtag #FinTok amassing more than 4.7 billion views on the platform. In her article, Dickler describes the upside and downside of FinTok, which has become one of the most popular sources for financial information, especially among Gen Z.

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Curation by Stuart Fujiyama, CFA and Sona Shahinian

LOUD BUDGETING IS THE NEW 2024 TREND

Writer and comedian Lukas Battle delivers his viral new year call for #loubudgeting.



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Big Fans of Girl Math

On “Aotearoa’s best breakfast radio show,” ZM Podcast Network’s Fletch, Vaughan & Hayley walk us through the math of #girlmath.

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Trying to Get Ahead While I Have The Chance

London-based content creator Yasmine Camilla demonstrates the practice of #cashstuffing.



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Establishing Impactful Connections through Networking: Career Talk Insights with Arielle Bittoni



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Arielle Jacobs-Bittoni - an entrepreneur, CFA charterholder, and a certified financial planner - has overcome obstacles in her journey from financial advisor to wealth management. Obtaining the CFA professional designation has opened up new opportunities for her and allowed her to build valuable relationships through our CFA society. She encourages young women to pursue the CFA certification fearlessly, as it can lead to significant professional growth despite challenges.



E-Newsletter - February 2024

The CFA Society Los Angeles (CFALA) e-newsletter is a periodic publication with stories about noteworthy events and programs sponsored or hosted by the society, guest articles by members, book reviews, and other items of interest to CFALA members. If you'd like to contribute a story suggestion or write an article, we'd love to hear from you. Please email Executive Director Laura Carney at laura@cfala.org.

Please note that the content of this e-newsletter should not be construed as investment advice, nor do the opinions expressed necessarily reflect the views of CFA Society Los Angeles.