

Joseph Roberts, CFA Named February Volunteer of the Month



In addition to CFA Society Los Angeles' (CFALA's) dedication towards education and career benefits, CFALA strives to provide networking and community-building opportunities for members. CFALA's 2016 February Volunteer of the Month, Joseph Roberts, CFA, has been a valuable member of the Social Committee and a Review Program Mentor for Level I Candidates. Roberts believes that the relationships fostered through CFALA are as important as the educational programming.

"The best way to meet people is to do activities together and create relationships," Roberts explained. "At the more casual events, you create deeper relationships and long-lasting friendships. When times get rough or if you have questions, you have that camaraderie with others in the industry to be able to help each other out through those times."

As a part of the Social Committee, Roberts has helped spearhead a large growth in community-oriented event programming for members. The Social Committee doubled attendance in the enormously successful 2nd Annual 2015 CFALA Social Hike and Lunch, which left many attendees exchanging numbers and planning their own outings. Due to their love of snowboarding, Roberts and Michael Treidl, CFA launched the Annual Bear Mountain Ski/Snowboard Trip that is returning for the 2nd time as well.

"I love being part of the Social Committee," he said. "We all, especially in the financial industry, are incredibly busy with day jobs and working away from our families so it's great being part of the Committee because I get to meet other colleagues that share the same interests and passions outside of finance. This allows me to plan such events like the Annual Bear Mountain Ski/Snowboard Trip."

Roberts received his CFA designation in 2014, but has been an active member of CFALA since 2013. He highly values the importance of CFALA for local CFA Charterholders and being a volunteer for the organization.

"I think CFALA is one of the best societies to be a part of because of its diverse network," Roberts said. "When you volunteer, you are really diving in and believing in [the organization]. You can't really be active in CFALA and create those relationships unless you volunteer."

Roberts received a B.S. in Finance from California State University San Bernardino. He is currently an analyst at Capital Group and the co-founder of MarketShift. He has previously worked at Wilshire Associates, Western Asset Management, and LPL Financial.