Charlotte Chamberlain, Ph. D, Named January Volunteer of the Month

The investment business is constantly changing. Charlotte Chamberlain, Ph. D, our January volunteer of the month, brings a wide knowledge base and long, diverse career to her mission of keeping society members well informed.

Chamberlain is chair of the Portfolio Management Community of Interest, a position she has held for the last four years. She is a long-time CFALA member, joining the society in 1994.

"We want to be sure that members stay up to date on what's happening in the investment industry," Chamberlain said. "One of the main responsibilities of the society is to help members stay on the cutting edge of knowledge being developed for the investment community, which helps CFA professionals be of maximum benefit to their clients."

The Portfolio Management COI brings in experts from a wide variety of investment disciplines, with a recent interactive presentation featuring Vanguard's Jim Rowley examining the evolving role of ETFs in the indexing landscape and examining drivers of ETF growth. Rowley also discussed factors affecting ETF liquidity, considerations for portfolio construction using ETFs, and best practices for ETF trading.

"Portfolio management is one of the cornerstones of investment analysis, which is basically the question of how you allocate assets, which in turn has been shown in numerous studies to be a major contributor to alpha over the long run," Chamberlain said.

Chamberlain, who holds a Ph. D in economics from Cornell, has worked both within the investment industry and in government. She was managing director in equity research at Jefferies & Company, Inc., covering financial services, a vice president at Wedbush Morgan, executive vice president and director of strategic planning at Glendale Federal Bank, served on the Thrift Institutions Advisory Council of the Federal Reserve Board of Governors and also was Chief Economist and Director of Policy and Economic Research at the Federal Home Loan Bank Board.