

JOHN DEFONSO, CFA, CPWA®, NAMED VOLUNTEER OF THE QUARTER



The CFA Society of Los Angeles is proud to honor John DeFonso, CFA, CPWA®, with the *CFA Society of Los Angeles Winter 2021 Volunteer of the Quarter* recognition, due to his long-standing dedication to volunteerism with the Society.

John DeFonso is a long-time member and a highly involved volunteer who currently sits on two advisory councils, the Wealth Management Advisory Council and the FinTech Advisory Council. These councils are responsible for creating engaging content for the members by sponsoring various events including the popular Wealth Management Excellence Series. The series has been a staple of programming since 2016 and brings together thought-leaders to address the concerns and interests of wealth advisory practitioners.

“I attended the programming of the Wealth Management Advisory Group for a few years,” said DeFonso, “the networking environment and opportunity to interact with colleagues and influential speakers inspired me to volunteer.”

“It’s my guess most Charterholders have experienced above average fortune in this world,” said DeFonso, “volunteerism is one way to respect that and it’s gratifying to sacrifice time so others may benefit.”

“As a member of the Wealth Management or FinTech Advisory Councils, you can expect to be tasked with leading the effort to stage an event,” said DeFonso. “It’s natural to feel pressure to stage an event that will be topical and interesting to an elite group of 2,300 professionals, but the opportunity to work closely with genuine luminaries in our industry is well worth it.”

“I was thrilled with the opportunity to meet and have candid conversations with luminaries such as Roger Ibbotson, Richard Bernstein, and Rob Arnott among others. You have more access to the speakers when you are on the board and/or recruiting them.”

DeFonso has been in the wealth advisory business for over 20 years providing advice, investment management, and planning. In addition to being a Chartered Financial Analyst® Charterholder, he is also a Certified Private Wealth Advisor® designee. DeFonso earned a BS in Economics from the Wharton School from the University of Pennsylvania. He enjoys traveling, having visited 50+ countries, golfing, skiing, and backcountry hiking. He and his wife are sometimes proud parents of two usually good children.