Finance Professionals - Certified Financial Analysts (CFA’s)

Date: Monday, February, 29th
Venue: Johnson Room in the Library
Time: 5:00pm
Dressing: Business Attire
Refreshments will be provided

Gail Bruhn, MBA, CPA, CFA
Gail Bruhn is a retired senior financial executive with background in asset management in the insurance (CIGNA, AETNA/AELTUS/ING) and banking (Webster Bank) industries. She also served as CFO of a non-profit organization and currently serves as Treasurer and Board member of the Northeast CT Economic Alliance, is Board member and Chair of the Investment Committee of the Edwin O. Smith Foundation, the CT Horticultural Society and Joshua’s Trust. She also serves on the Advisory Council of the Hartford Society of CFA’s where she has been instrumental in establishing a University Outreach effort and has worked with students on the CFA Research Challenge for the past three years. She is skilled in analyzing strategy and understanding the operations, management competency and capital structures of companies within numerous industries. Gail has an undergraduate liberal arts degree from the University of Delaware and MBA from the University of Connecticut.

Leslie L. White, CFA
Leslie is the President and founder of Troika Investment Advisors, LLC. She has held various positions in industry. She has been Senior Investment Analyst Manning & Napier Advisors, Inc. Rochester, NY from 1993 – 1999; Vice President, CIGNA Investments, Inc., Bloomfield, CT from 1986 – 1993; Senior Financial Analyst, The Travelers Investment Management Company, Hartford, CT from 1985 – 1986 and Security Analyst with Connecticut Bank and Trust Company, Hartford, CT, from 1982 – 1985. In these positions Leslie covered large capitalization equities in the consumer area and marketed new stock ideas to portfolio managers. She has been very active in CFA Hartford Society activities. She is a graduate of Trinity College.

Daniel W. Keating, CFA
Dan is a Senior Wealth Strategist at UBS with over 25 years of investment management and financial services industry experience. He is responsible for developing and implementing comprehensive investment solutions designed for institutional and high new worth clients. Responsibilities include strategy development, portfolio structuring and allocation, selection and oversight of money managers, performance attribution and risk analysis. Prior to joining UBS, Dan served as a Sr. Investment Management Specialist at CITI Smith Barney and as a Director/Sr. Portfolio Strategist for Institutional Investments and Bank of America. An alumnus of Boston College with a B.A. in political science and philosophy, Dan is a CFA Charter Holder and a member of the CFA Institute. He resides in West Hartford, CT with his wife and two children.

Please RSVP to Karen Crowley: crowleyk@easternct.edu by February 19th. If you are currently taking BUS/FIN 438 Bank Management or have already given your name to Prof. Weiping Liu for this event you do not need to RSVP.