The Chartered Financial Analyst designation is globally recognized and valued. Over the years, the CFA Institute has focused on and maintained the highest standards, while also adapting to the changing needs of society and the financial industry, including the skills required to maintain that highest quality standard.

We recently had the opportunity to sit down with **Alex Canellopoulos, CFA**, Director of Investments at Vista Capital Partners, to learn more about his unique CFA journey.

Question: Alex, can you tell us a bit about your career journey and what led you to the investment industry? Share your unique path and the factors that sparked your interest in finance and investing.

Answer: I grew up in Greece and attended a German school, so I was shaped by both cultures from an early age. During that time, Greece was going through a financial crisis that affected many people's lives, including my own. Watching those events unfold first sparked my interest in financial markets. I wanted to understand what was happening in my country and what drove such large-scale economic change.

Later, I came to the United States on an athletic and academic scholarship, where I studied finance and international business. During college, I interned at a Big Four accounting firm, which gave me a solid foundation in financial analysis and business fundamentals. After graduation, I started my career as a credit analyst at a bank in Montana. It was a great learning experience, but I realized what really fascinated me were capital markets. What interested me was the constant evolution, the need for thoughtful decision-making, and the mix of analytical rigor with human behavior.

That realization led me to begin studying for the CFA charter and to look for opportunities that aligned more closely with my interests. Eventually, I moved to Portland and joined Vista Capital Partners, where I've now been for almost five years. As Director of Investments, I lead efforts to improve portfolio construction, strengthen research, and enhance the overall client experience. My goal is to make investing more intuitive and rewarding for our clients.

Question: What are your specific areas of interest and expertise within the investment field?

Answer: I'm interested in portfolio construction and management. My goal is to build portfolios that are well-diversified, evidence-based, and aligned with clients' long-term goals. But beyond the technical side, I've become increasingly fascinated by behavioral finance. I believe most investors succeed or fail because of their emotions. Understanding how fear and greed drive decision-making is one of the most powerful aspects of our work. Helping clients stay the course and make rational choices in emotional moments is both a challenge and a privilege.

Question: What do you find most rewarding about being a CFA charterholder? Or how has the CFA Program helped you progress as an investment professional?

Answer: The CFA Program was a demanding but incredibly valuable experience. Beyond the technical knowledge, it instills a level of confidence that changes how you approach your work. After earning the charter, I noticed a shift in my application of new concepts. You start to connect ideas more clearly, recognize patterns more quickly, and communicate complex topics more effectively. People also begin to listen differently—not because of the letters after your name, but because the process of earning the charter forces you to think deeply and critically. It builds credibility through competence and consistency. The program teaches you how to think, how to analyze, and how to stay disciplined in a world that constantly tests both your knowledge and your conviction.

Question: What advice would you give students thinking about pursuing the CFA Program?

Answer: It's absolutely worth it. The program is long and requires real commitment, but the growth that comes from it is tremendous. My advice would be to set a plan, stay disciplined, and execute—just like you would with a good investment strategy. There will be moments when you feel like you're not doing enough or that there's always more to learn. That's normal. You'll never know everything perfectly, and that's okay. What matters most is consistency and trusting that your effort compounds over time. Finally, remember that the CFA Program isn't just about passing exams. It's about developing the mindset of a lifelong learner. The learning doesn't stop once you earn the charter.

In concluding our conversation, a key takeaway from the vantage point of a long-time charterholder is that the value of the CFA designation in combination with the value of diverse candidate journeys supports excellence through the years.