



New CFA Charterholder Conversation:

At the CFA Society Portland Holiday party in 2025, new CFA charterholders were congratulated and introduced to the membership. We recently had an opportunity to sit down with Lucy Newman, one of the Society’s newest CFA Charterholders.

We had a lively conversation over coffee at Peet’s in Lake Oswego. Given the continued low percentage of women CFA charterholders overall, hearing Lucy’s journey was both insightful and inspiring. We hope readers will find her story not only interesting, but also valuable. Her path began in childhood in Connecticut, when her mother planted the seed of “investing early” for lifelong benefits. That early family wisdom, combined with intellectual curiosity over the years, has shaped not only her professional accomplishments but also an eclectic journey along the way.

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

Yes, happy to. I graduated from Carleton College with a BA in Biology, but I wasn’t ready to jump into graduate school like many of my peers were. I also did not see many entry-level science roles that felt like the right fit, so I broadened my search. My initial interest in investing really came from my family—relatives taught me early on about personal finance, and a 529 Plan my grandfather started for me as a baby ultimately helped fund much of my college education. Seeing how long-term investing made such a concrete difference in my life made an impression.

2. What are your specific areas of interest and expertise within the investment field?

My areas of interest and expertise are portfolio management and manager research. In my current role, I lead our firm's public markets research efforts. I love it because I really enjoy detailed and in-depth research on each strategy and evaluating its efficacy against peers, as well as its unique role in a portfolio. What I enjoy most is when I'm able to take complex, technical information and translate it into clear, actionable insights that help my colleagues and our clients make confident investment decisions.

3. What do you find most rewarding about being a CFA charterholder? Or how has the CFA program helped you progress as an investment professional?

Because of my unique background, the CFA charterholder knowledge gained has enabled me to translate my college educational accomplishments into a very different specific set of skills such that I am confident in my abilities in my now-chosen career path. The additional education that the CFA program afforded has made all the difference. It has given me a great foundation and level of expertise to build on!

4. What advice would you give students thinking about pursuing the CFA program?

You won't regret studying for the CFA exams. My experience was that each level meaningfully elevated my skills and confidence. Earning the charter felt great, and even better has been the reward in seeing how much my day-to-day expertise has grown along the way. Whether knowing what attributes I am looking for in an investment or backtesting data to evaluate the conclusions, each new research or analytical evaluation I take on reminds me how much I value lifelong learning and the doors that open from that.