

Profile of Success: Jenn Feliberty, Senior Fixed Income Trader, TD AmeriTrade

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Why should women ask more questions? Hear Jenn's take on that – plus, the foundation she says was key to her career and why embracing tech — including mobile — is crucial to success.

Question: As someone who has been involved in the trading space for many years, what are some of the biggest changes you've seen in the space and how have you adjusted to them?

A: Technology has allowed us to speed things up but the principles of teamwork have not changed. Paper tickets, leather portfolio binders, index cards and paper clips were essential tools to track bond inventory fifteen years ago. These tools are not always used today but have shown themselves in different forms. For example, circling bonds for a salesperson would require pulling the appropriate index card from the portfolio holder, writing down how many the salesperson was interested in and circling the amount of bonds in pencil so that the bonds would not trade away from the representative. Today, I am able to lower my quantity size on a trading platform and add an electronic note. Yesterday and today require the same exact skill, which is communication, and this is essential for a team. It can be very difficult at times to have full conversations in a fast paced environment. A strong team should have constant communication.

Question: What is some advice you would give to women to help them advance in their careers?

A: The best advice I was given early in my career is to ask more questions. If something seems unclear to you or there is a serious breakdown in communication, it is time to take a step back and ask questions. This has been helpful in professional and personal relationships because the right question can lead the conversation in a positive direction. You may get to learn something new or view a problem in a different light.

Question: What have been key elements to your own personal success?

A: I grew up in a family business household. This could be a different setting than other families because we would talk about promotions for the store and what to make for dinner in the same sentence. When the business model could not keep pace with the accelerating e-

commerce, the difficult decisions started. These tough lessons stayed with me and thankfully the employees affected are now doing well, which was important to us. A responsible business owner can be taught the necessary skills, such as economic theory and corporate finance, which is needed to analyze and run a business. However, having a good heart is just as essential when people matter the most.

Question: What are some steps that need to be taken to get more women in financial services and/or the legal arena?

A: Women who are financially savvy should seek out the next generation of financial professionals and show them as many options as possible. Young girls who show entrepreneurial skills or know the value of the dollar should be taught that there is a career in that skill. Cultivating this skill can be as easy as starting the conversation and women to inquire about a higher job position or teaching a young girl to sell homemade items to friends and family.

Question: Why did you make the step to return to school and pursue your MBA?

A: I decided that it was the right time to continue my education and was accepted into the University of Rochester Simon Business School Masters of Finance program in New York City. I will then continue on and complete the MBA requirements through the Simon Business School. My goal is to framework trends, analyze economic data and compliment my current resources. This foundation is extremely valuable to me. An MBA would also give me the credibility that is needed when using my talents and I hope to grow from the experience professionally and personally.

Question: What trends are currently affecting the financial service industry?

A: The financial service industry has heavily invested in giving mobility to their customers through smartphone applications, online transactions or dedicated live support. These items are necessary today however, the customer is anxious about their own security and how a security breach can affect them. More conversations need to be held and this may include public policy on a level of government shield of protection. There are different takes on this debate however, these conversations are necessary.

Question: How has your involvement in the FWA benefited your own life?

A: The FWA has an amazing mix of intelligent women who are diverse and ready to discuss important topics such as public policy, corporate governance, financial literacy and so much more. I have had the privilege of working on three committees. The stimulating conversations and charitable mind frame that I share with the men and women of the FWA is what makes the organization so unique.