

# Member of the Month – Maritza Irizarry

[fwa.org/spotlight/member-of-the-month-maritza-irizarry/](http://fwa.org/spotlight/member-of-the-month-maritza-irizarry/)

*We are kicking off Fall 2018 by profiling FWA members who have inspiring stories to tell. Meet the September FWA Member of the Month and see what they are doing in the Financial community.*

Our Member of the Month – September 2018

## **Hello Maritza and welcome to the FWA! Please tell us about your FWA journey so far.**

I joined the FWA about a year ago: a good friend from church (and current FWA President Elect), Simone Vinocour, introduced me to the organization after I explained that I was looking to join a community of women in finance. I had been volunteering for my church, the Parent’s League of New York and the local community. Now, my son was grown up. I was ready to focus on myself and join a community that would connect with my professional background and where I could continue to give back.



The FWA was the perfect fit and after a year in the organization, I am very excited to co-chair the Holiday Benefit, one of the FWA’s signature events. It is a team effort and a lot of fun.

So far, I have really enjoyed connecting with members at the FWA who make themselves available and value authenticity. I am also enjoying sharing who I am and the educational events which allow for personal leadership development.

## **You volunteer with other organizations. What sets the FWA apart?**

The FWA is a solid group of women who value financial independence and long-term relationships at the same time.

It’s this combination that makes the FWA community unique in its membership: the sense of advocacy for women and appetite to build strong bonds create a community where members want to actively participate and volunteer. And this is not easily replicated in other organizations.

## **How did you begin your career in financial services?**

My first job out of University was as a junior trader on the U.S. government bond trading desk and was memorable: I was the only female junior trader on the desk working for a female trader! I would begin work at 6:45am and really enjoyed the energy, the pace and the fact that we were following world events each day.

## **You graduated in Finance?**

Yes! Although I was initially interested in a career in medicine!

While I was working through high school at The Gap, a colleague connected me to a broker. I spent time with him and learned more about finance at large. When I went to college at St. John's University (SJU), I became a leader within the Economics and Finance Society by bringing the AT&T Investment Competition to the university. When I approached professors about the idea to bring professors onboard to develop a collaborative learning experience for fellow finance students, an anonymous donor emerged whose contribution offset the entry fee for SJU students making the fees more affordable. We surpassed our goal of 50 students. By involving the entire university and students from both the Queens and Staten Island campuses, we had 154 entries, enough to put SJU into the National AT&T Investment Competition. This experience opened-up doors to work in trading upon graduation.

## **Did you pursue a career as a trader?**

I realized that trading didn't suit my personality. I eventually moved into the portfolio management side of investments thanks to a headhunter and enjoyed the analytical aspect of the work. Also, with my background in computer science, I was able to automate many aspects of my work (in fact I reduced a 4h00 piece of work down to 15 minutes!). With all the free time I had on my hands, I went to roadshows, grew my network and learned more about the industry at large.

I was fortunate to be recruited to a boutique REIT portfolio management firm whose portfolio of real estate securities was managed by a very highly respected woman. The firm was in growth mode because of its interest in expanding in the U.S. and institutional money. I focused on developing the performance composite according to AIMR standards for use in institutional pitch books. With the historical performance composite in place, the institutional salesman delivered the pitch books to consultants and really grew the firm's assets from \$700 million to several billion in a few short years.

I stayed in NY and developed pitch books for the equities, fixed income and balanced portfolio as well as all the marketing and compliance reporting for offshore funds. Due to the tax implications on investments for our offshore clients and my expertise in offshore tax structures relative to the United States, I was responsible for the firm's offshore individual accounts and investor funds worldwide.

Being part of a team that was in growth mode, I was offered many opportunities to raise my hand and jump in. This was a particularly exciting time for me as a woman in the finance industry.

Shortly after my son was born, I took a pause and focused on project-based work supporting non-profits and giving back to the community.

Now I am now actively seeking to jump back into a full-time role in banking.

**What are the top three takeaways learned from your experiences so far:**

1. Jump in and give back
2. Be open to other peoples' experiences
3. Be true to your self-worth

**Do you have any book to recommend our FWA community?**

Yes, I do: 'Presence' by Amy Cuddy. It focuses on the importance to bring your best, authentic self which, in turn, shows the value behind diversity.