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CFA Society of Mississippi Media Guide

-- February 2008 --

The mission of the Society is to foster a community of investment and financial professionals in Mississippi with the highest levels of ethics and competence.

www.cfamississippi.org

CFA Society of Mississippi Media Contact:
Robin Perry
Phone: 601.981.5332 ext. 1486
Email: rperry@sfbli.com

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TABLE OF CONTENTS

CFA MISSISSIPPI

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CFA Society of Mississippi is a non-profit membership organization for financial practitioners. The society was founded in 1984 and currently has 55 members. As one of 135 CFA Institute affiliated professional societies in 56 countries, the society's mission is to foster a professional community of investment and financial professionals in Mississippi with the highest levels of ethics and competence. Throughout the year, the CFA Society of Mississippi hosts luncheons featuring investment and financial speakers from across the United States. At the beginning of each year, the society presents its Annual Forecast Dinner during which distinguished financial experts provide their outlooks for the upcoming year. The dinner is Mississippi's premier event for serious investors.

This media guide provides contact information for members who have qualifications and expertise in various financial areas. We hope that you will find this list useful as you develop reports and search for financial-related sources.

Robin Perry serves as our Public Awareness Chair and as the primary media contact for our society. Also, additional society information can be found at the CFA Society of Mississippi web site at www.cfamississippi.org.

Please feel free to contact Robin or me if our society can assist you in any way.

Best regards,

Alan

L. Alan Smith, CFA
CFA Society of Mississippi President
Phone: 601.368.5433
Email: LSMITH8@entergy.com or president@cfamississippi.org

CFA Society of Mississippi Public Awareness Chair:
Robin Perry
Phone: 601.981.5332 ext. 1486
Email: rperry@sfbli.com

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CFA Society of Mississippi

Mission Statement and Purpose

The mission of the Society is to foster a community of investment and financial professionals in Mississippi with the highest levels of ethics and competence.

Our purpose:

1. To provide a professional society and network that meets and interacts together on a regular basis.
2. To provide educational and informative programs relevant to our members that increases our competence.
3. To foster a high standard of ethic and standard in our local community of investment professionals
4. To promote participation in and the achievement of the Chartered Financial Analyst® designation by people already in our industry or desiring to enter it.
5. To enhance awareness in our community of the Chartered Financial Analyst® designation as well as the CFA Society of Mississippi and the unique qualities of our members with in the financial industry.

2007-2008 Officers

PRESIDENT
L. Alan Smith, CFA
Phone: 601.368.5433
Email: lsmith8@entergy.com
or president@cfamississippi.org

SECRETARY
Gene Morse, CFA
Phone: 601.933.3395
Email: Gene.Morse@ergon.com

VICE PRESIDENT
Heath Jordan, CFA
Phone: 601.208.2926
Email: hjordan@trustmark.com
or vicepresident@cfamississippi.org

TREASURER
Tony D. Edwards, CFA
Phone: 601.898.4863
Email: tonyedwards@bankplus.net

2007-2008 Board of Directors

Charles W. Alley
Tony D. Edwards, CFA
Arthur Finkelberg, CFA
Heath R. Jordan, CFA
Elizabeth M. McLean, CFA
Eugene R. Morse, CFA
Roger E. Muns, CFA
Walter P. Neely, CFA
Robin Leigh Perry
L. Alan Smith, CFA

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CFA Society of Mississippi
List of Member Media Contacts

(Alphabetical order)

Member Name	Firm	Phone	Email
Nancy Lottridge Anderson, CFA	New Perspectives, Inc.	601.991.3158	nanderson@newper.com
Arthur Finkelberg, CFA, CFP	A. G. Edwards & Sons, Inc.	601.898.8787	arthur.finkelberg@agedwards.com
Marsha P. James	University of Alabama	601.750.8997	mjames@cba.ua.edu
Eugene Richard Morse, CFA, CPA, CIA	Ergon, Inc.	601.933.3395	gene.morse@ergon.com
Doug P. Muenzenmay, CFA	Trustmark National Bank	601.208.5173	dmuenzenmay@trustmark.com
Roger E. Muns, CFA, CPA	Wealth Management, LLC	601.991.0230	muns@bellsouth.net
Dr. Walter P. Neely, CFA	Millsaps College	601.974.1263	neelywp@millsaps.edu
Doug Ralston, CFA	Trustmark	601.208.6576	dhralston@trustmark.com
Tate Reeves, CFA	State of Mississippi	601.359.3600	treeves@treasury.state.ms.us
Julius Ridgway Jr., CFA	Medley & Brown	601.982.4123	julius@medleybrown.com
J. Richard Seale, CFA	Legg Mason	1.800.737.4232	jrseale@leggmason.com
Daniel Spivey	Morgan Keegan & Co., Inc.	601.368.2200	dan.spivey@morgankeegan.com
Charles D. Wilkinson, CFA	Langford Investment Co.	601.948.3584	cwilkin@aol.com

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Member Name:	**Nancy Lottridge Anderson, CFA**
Title:	Investment Manager/President
Employer:	New Perspectives, Inc.
Telephone:	601.991.3158 *[Preferred]*
Fax:	601.991.3168
Email:	nanderson@newper.com
Firm description:	Investment counseling firm
Responsibilities:	Portfolio manager / Investment consultant
Subject areas prepared to discuss with Media:	Equities, Personal financial planning issues, Financially-related legislation, Mutual funds/savings and investment options, Portfolio management/investment strategies, Tax issues, Global events/markets overseas, Tax-deferred savings plans, Ethical issues and the law, and Social Security reform
Professional background and qualifications:	CFA® charterholder since 1996, MBA in 1993, Candidate in PhD/Finance MSU, Adjunct professor at Mississippi College, Owned my own investment counseling business since 1993.

Member Name:	**Arthur Finkelberg, CFA, CFP**
Title:	Senior Vice President - Investments
Employer:	A. G. Edwards & Sons, Inc.
Telephone:	601.898.8787 *[Preferred]*
Fax:	601.898.8584
Email:	arthur.finkelberg@agedwards.com
Firm description:	Brokerage firm
Responsibilities:	Portfolio manager
Subject areas prepared to discuss with Media:	Equities, Personal financial planning issues, and Portfolio management/investment strategies
Professional background and qualifications:	CFA® charterholder since 1996, accredited as a Certified Financial Planner in 1991, MBA and Certificate in Professional Accounting, started career as an investment broker in 1982 and joined A.G. Edwards in 1988, Board Member and Past President of CFA Society of Mississippi.

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Member Name:	**Marsha James**
Title:	Instructor
Employer:	University of Alabama
Telephone:	601.362.0393 (home) or 601.750.8997
Fax:	Not available
Email:	mjames@cba.ua.edu *[Preferred]*
Firm description:	Finance Ph.D. student
Responsibilities:	Academic
Subject areas prepared to discuss with Media:	Corporate finance, Investment analysis, and Initial public offerings (IPOs)
Professional background and qualifications:	MBA, Millsaps College, Passed CFA® Level I, II, & III exams, ABD in finance at the University of Alabama in Tuscaloosa.

Member Name:	**Eugene R. Morse, CFA, CPA, CIA**
Title:	Financial Analyst
Employer:	Ergon, Inc.
Telephone:	601.933.3395
Fax:	Not available
Email:	gene.morse@mac.com *[Preferred]*
Firm description:	Oil & Gas Operations (privately held corporation)
Responsibilities:	Mergers and Acquisition / Joint Venture analysis, Internal reporting development, and Internal Audit
Subject areas prepared to discuss with Media:	Financially-related legislation and Ethical issues
Professional background and qualifications:	Tulane MBA, CFA® charterholder, CIA – Certified Internal Auditor, CPA – Certified Public Accountant, former WorldCom Internal Audit Manager

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Member Name:	**Doug Muenzenmay, CFA**
Title:	Investment Officer
Employer:	Trustmark National Bank
Telephone:	601.208.5173 *[Phone or email preferred]*
Fax:	601.208.2317
Email:	dmuenzenmay@trustmark.com
Firm description:	Investment company/Mutual fund
Responsibilities:	Portfolio manager
Subject areas prepared to discuss with Media:	Equities, Corporate earnings/analytics, Personal financial planning issues, Mutual funds/ savings and investment options, Portfolio management/investment strategies, and Economic statistics
Professional background and qualifications:	B.A. Economics from University of Iowa, CFA® charterholder, 15 years investment experience in equities and fixed income.

Member Name:	**Roger E Muns, CFA, CPA**
Title:	Managing Member
Employer:	Wealth Management, LLC
Telephone:	601.991.0230 *[Contact by phone, fax or e-mail]*
Fax:	601.991.0230
Email:	muns@bellsouth.net
Firm description:	"Fee only" investment advisory firm
Responsibilities:	Portfolio manager
Subject areas prepared to discuss with Media:	Equities, Personal financial planning, Financially-related legislation, Portfolio management, Tax issues, Treasury & corporate bonds, Ethical issues and the law, and Social security reform
Professional background and qualifications:	Five years as a practicing CFA® charterholder and twenty-one years as practicing CPA, Contact in Mississippi for CFA Institute's Centre for Financial Market Integrity, Board Member and Vice-President of CFA Society of Mississippi 2005-2006.

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Member Name:	**Dr. Walter Neely, CFA**
Title:	Professor of Finance
Employer:	Millsaps College
Telephone:	601.974.1263 *[Phone or email preferred]*
Fax:	601.974.1260
Email:	neelywp@millsaps.edu
Firm description:	University
Responsibilities:	Academic
Subject areas prepared to discuss with Media:	Equities, Portfolio management, Treasury & corporate bonds, Derivatives, Economic statistics, Ethical issues, and Social security reform
Professional background and qualifications:	CFA® charterholder with publications in various financial journals, Ph.D. from the University of Georgia, B.A. and M.B.A. from the Mississippi State University, 2005-2006 Board Member and Past President of CFA Society of Mississippi.

Member Name:	**Doug Ralston, CFA**
Title:	President, Trustmark Investment Advisors, Inc
Employer:	Trustmark
Telephone:	601.208.6576 *[Preferred]*
Fax:	601.208.2317
Email:	dhralston@trustmark.com
Firm description:	Investment advisory of Commercial Bank
Responsibilities:	Buy-side, portfolio manager, investment firm manager
Subject areas prepared to discuss with Media:	Equities, mutual funds, portfolio management/investment strategies, economic statistics, etc
Professional background and qualifications:	Mr. Ralston is a Chartered Financial Analyst with over 18 years of investment industry experience. He is the President and Chief Investment Officer of Trustmark Investment Advisors, Inc. which oversees $2 Billion in discretionary assets.

info@cfamississippi.org
www.cfamississippi.org

Member Name:	**Tate Reeves, CFA**
Title:	State Treasurer
Employer:	State of Mississippi
Telephone:	601.359.3600
Fax:	601.576.4495
Email:	treeves@treasury.state.ms.us
Firm description:	Government
Responsibilities:	Public Finance
Subject areas prepared to discuss with Media:	College Savings Plans and Public Finance
Professional background and qualifications:	State Treasurer, Former banking investment officer, BS in Economics from Millsaps College, CFA® charterholder, Additional information available at website

Member Name:	**Julius Ridgway Jr., CFA**
Title:	Portfolio Manager
Employer:	Medley & Brown
Telephone:	601.982.4123
Fax:	601.366.0013
Email:	julius@medleybrown.com *[Preferred]*
Firm description:	Investment counseling firm
Responsibilities:	Portfolio Manager
Subject areas prepared to discuss with Media:	Equities, personal finance, mutual funds, portfolio management
Professional background and qualifications:	CFA® charterholder, portfolio manager, investment advisor

Member Name:	**J. Richard Seale, CFA**
Title:	Senior Portfolio Manager; Senior V.P.- Investments
Employer:	Legg Mason
Telephone:	1.800.737.4232 *[Email or fax preferred, Please note that compliance approval is required for communication with media contacts.]*
Fax:	318.227.1650
Email:	jrseale@leggmason.com
Firm description:	Legg Mason's core businesses are: investment advisory services, securities brokerage and capital markets.
Responsibilities:	Portfolio Manager**,** Private Client Group
Subject areas prepared to discuss with Media:	Portfolio management/investment strategies, Global events, Economic statistics, US Treasury bond markets, Ethical issues, Derivatives, Social Security reform, Behavioral Finance, Written Investment Policy process
Professional background and qualifications:	CFA® charterholder since 1996, Grader for CFA exams last 7 years, Adjunct Professor at the Frost School of Business, 25 years in the investment business.

Member Name:	**Daniel Spivey**
Title:	Vice President
Employer:	Morgan Keegan & Co., Inc.
Telephone:	601.368.2200 *[Preferred]*
Fax:	601.368.9992
Email:	Dan.spivey@morgankeegan.com
Firm description:	Brokerage firm
Responsibilities:	Portfolio manager / Investment consultant
Subject areas prepared to discuss with Media:	Equities and Corporate earnings
Professional background and qualifications:	MBA from Millsaps College, 10 years experience in investments

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Member Name:	**Charles D. Wilkinson, CFA**
Title:	President
Employer:	Langford Investment Company
Telephone:	601.948.3584
Fax:	601.948.4522
Email:	cwilkin@aol.com *[Preferred]*
Firm description:	Self-employed Registered Investment Advisor
Responsibilities:	Portfolio manager
Subject areas prepared to discuss with Media:	Equities, Mutual funds, Portfolio management/investment strategies, US Treasury and Corporate bond markets
Professional background and qualifications:	CFA® charterholder, Charter member and past president of CFA Society of Mississippi, Over 25 years in portfolio management, including 10 years as Investment Manager for PERS of Mississippi

info@cfamississippi.org
www.cfamississippi.org

CFA Society of Mississippi Membership Profile

The Mississippi Society currently has 55 members. The following is a breakdown by industry and title.

CFA Charterholder Information	Percent
CFA charterholder	70%
Non-charterholder	30%

Industry Classifications	Percent
Broker Dealer, Investment Banking	19%
Commercial/Retail Banking, Bank Trust Departments	26%
Consulting Firm	4%
Corporate/Public Sponsor & Foundation/Endowment	0%
Insurance Company	4%
Investment Company/Mutual Fund	0%
Investment Management Counseling	15%
Other businesses including government, academic, and miscellaneous	22%

Titles and Occupations	Percent
Analyst, Equity & Fixed Income	8%
Analyst, Other	3%
CEO, Chairman, Partner, Principal	7%
Chief Investment Officer	9%
Investment Banker	5%
Investment Counselor	9%
Investment Firm Manager	7%
Portfolio Manager	20%
Sales/Marketing	6%
Securities Trader	5%
Other	20%

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About the CFA Institute

CFA Institute is the global, non-profit professional association that administers the CFA curriculum and examination program worldwide and sets voluntary, ethics-based professional and performance-reporting standards for the investment industry. CFA Institute has over 93,000 members in 130 countries. Its membership includes 135 affiliated professional societies in 56 countries. Recently CFA Institute announced a Global Investment Performance Standards (GIPS®) certification program for performance measurement practitioners. The curriculum covers professional ethics; the GIPS standards; and investment performance measurement, analysis, and evaluation. More information about CFA Institute may be found at www.cfainstitute.org or by calling 1-800-247-8132 or 1-434-951-5499.

About the CFA Program

First awarded in 1963, the CFA charter has become known as the designation of professional excellence within the global investment community. Around the world, employers and investors recognize the CFA designation as the definitive standard for measuring competence and integrity in the fields of portfolio management and investment analysis. The designation has worldwide recognition. The *Economist* ranked the CFA Program as the gold standard among investment analysis designations.

The CFA Program's self-study curriculum allows even the busiest investment professional to participate. The curriculum develops and reinforces a fundamental knowledge of investment principles. The three levels of examination verify a candidate's ability to apply these principles across all areas of the investment decision-making process. And the program's professional conduct requirements demand that both CFA candidates and charterholders adhere to the highest standards of ethical responsibility.

Drawing on a broad-based Body of Knowledge™, the CFA Program is intended to supplement the education and work experience of investment professionals. Although the program is open to a wide range of investment specialists, the curriculum emphasizes the knowledge and skills needed to be involved in asset valuation or portfolio management.

The CFA Program is comprised of three levels, each culminating in an examination. You must pass each level sequentially, and fulfill other requirements of the program, before earning the right to use the CFA designation. In general, each level of the program requires 250 hours of preparation, although time will vary from candidate to candidate based on familiarity with the material. The Level I examination is composed of multiple-choice questions, Level II is composed of item sets (multiple choice questions based on a common vignette), and Level III consists of essays and item sets.

Global acceptance of the CFA charter has led to tremendous growth in the program over the past decade. In June 2007, more than 90,000 candidates from 162 countries sat for one of the three levels of the CFA exam. More information about the CFA program can be found at http://www.cfainstitute.org/cfaprogram.

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