

Member Spotlight



James David Coker, CFA
President and Founding Partner,
Coker & Palmer, Inc.

David Coker, of Madison, is the President and founding partner of Coker & Palmer, Inc., an independent and full service financial advisory firm that provides comprehensive financial solutions for entrepreneurs, investors, professionals and retirees alike. David has a rich history in the financial services industry, going on 39 years of experience. In addition to being a long-time Society member and former Society Board President (2002-2003), he is a Chartered Financial Analyst and member the CFA Institute. His specialties and credentials include: Investment Banking, General Securities Principal,

Municipals Principal, Options Principal, Financial/Operations Principal, and Supervisory Analyst. He received his MBA from the University of Houston and BBA from the University of Texas.

Read more information about David in his answers to our Member Spotlight questions.

Who had the most influence on you growing up, and why?

My grandparents, Ogden and Ruby Coker, were truly "salt of the earth" people. They were loving, devoted grandparents who worked very hard all of their lives but found time for their 3 children and 8 grandchildren. While not well educated, Ogden only finished the 8th grade because of duties on the family farm, they believed strongly in education.

What made you decide to pursue the CFA charter?

I had already been in the industry for 10 years but found that the folks I knew who were either Charter holders themselves or were in pursuit of the Charter shared my enthusiasm for learning. Attending some local society meetings as a guest helped me to arrive at the decision to attempt to obtain the Charter.

What do you enjoy most about your current professional role?

I started our firm [Coker & Palmer, Inc.] 32 years ago. Although going out on your own entails some risk, it is very rewarding to obtain some success and grow with the help of good clients and associates.

What is the best advice you've ever received?

When I started as broker for one of the big wire houses 40 years ago, I was fortunate enough to be around a very successful senior broker who told me *"Always put your client first, the firm second, and yourself third in every thing you do. If you can do that, you will succeed."*

What motivated you to join CFA Society Mississippi?

I had several friends that were members of the Society and was fortunate to be included in several meetings and social events. I found all to be of very good character and was pleased to be associated with them.

What advice would you give to a current or potential candidate?

I would repeat the same advice that I was given regarding putting clients first, but I would add that the body of knowledge that is included in the pursuit of the CFA Charter is extremely valuable. In equipping yourself with such knowledge you are indeed putting your clients interest first with its application and with its Code of Ethics.