



CFA Society Mississippi Member Spotlight

Heath Jordan, CFA

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Heath R. Jordan, CFA, of Jackson, is the Senior VP & Chief Investment Officer for Trustmark Tailored Wealth where he specializes in portfolio management and investment strategies for individual and institutional clients. Heath possesses 25 years of investment management experience in analytical, portfolio management, and leadership roles as well leading technology and strategic changes within Wealth Management. For over a decade he proudly served in various roles on

our Board of Directors, including leading our Society as President from 2008-2009. In his spare time, Heath serves as an exemplary volunteer and furthers our mission by passionately mentoring candidates and inspiring those who express interest in pursuing the CFA Program. He is an alumnus of Belhaven University, where he currently serves on the Board of Trustees, and earned his Chartered Financial Analyst designation in 2002.

Read more information about Heath in his inspiring answers to our Member Spotlight questions below.

Who has had the most influence on you, and why?

In my early years, my father demonstrated an incredible work ethic, always striving to do his best, encouraging others to do the same, and looking for ways to help people. That mindset has benefited me tremendously. The other was a business and ethics professor in college, who presented complex business ethics cases for us to evaluate.

What made you decide to pursue the CFA charter?

I'm obviously biased in this response, but CFA was clearly the most focused and in-depth professional designation for those seeking a career in finance. I strongly believe that it still the case today.

What do you enjoy most about your current professional role?

Mentoring - Seeing individuals grow professionally and personally into their full capability is an incredibly rewarding process to be a part of. Strategy - This could be client or corporate related, but solving problems and improving outcomes is the goal.

What is the best advice you've ever received?

Confidence and pride are not the same thing. Everyone loves working with a confident person, but NOBODY wants to work with someone who seeks the limelight or takes credit for others efforts. This applies with both clients and colleagues, work or personal life.

What motivated you to join CFA Society Mississippi?

The opportunity to work and interact with other like-minded professionals who are dedicated to professional and ethical standards was the biggest draw to being part of the society.

What advice would you give a current or potential candidate?

1) Pace yourself - pursuing the CFA is a marathon. Don't start too early and then simply burn-out on studying. 2) Connect the dots - CFA is particularly challenging due to the fact that they expect you to draw the connections between all of the Learning Outcome Statements (LOS), not just memorize facts.