



CFA Society Mississippi Member Spotlight

Josh Norris, CFA, CFP, CPA

*Founder, LeFleur Financial,
Society Board Member,
CFA Society Mississippi (2025-2027)*

Josh is the founder of LeFleur Financial, a fiduciary advisory firm, where he has been advising clients for over a decade in the Jackson metro. He graduated with magna cum laude honors from the University of Mississippi and has been awarded the "Top 50 Under 40 (2019)" and "Top Entrepreneurs (2019)" by Mississippi Business Journal. He has been a member of our Society for over 5 years and has recently been elected to a position in the leadership of our Society on our Board of Directors (2025-2027).

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

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

Growing up, my parents were my greatest influences. They demonstrated integrity through their interactions with others and instilled the value of hard work by managing multiple jobs, engaging in community activities, and always being present for my sister and me.

What made you decide to pursue the CFA charter?

I decided to pursue a CFA charter to ensure I was fully equipped to serve my clients. I was already a CPA and a CFP, so I fought pursuing a third designation for a long time. But I'm a believer in lifetime learning, and the CFA curriculum is exceptional.

What do you enjoy most about your current professional role?

As an advisor, I really enjoy educating clients. There is so much anxiety and embarrassment around money, and the industry only makes it worse with confusing acronyms and jargon. So it's fun to empower clients with understanding so they have more confidence in the financial decisions they make.

What is the best advice you've ever received?

My dad has always said, "If you can't make a dollar, make fifty cents."

What motivated you to join CFA Society Mississippi?

I joined the CFA Society of Mississippi because I think it's important to be professionally engaged. We need younger people to join our ranks, and our state needs as many enterprising professionals as we can attract.

What advice would you give a current or potential candidate?

I would advise any candidate to try and enjoy the ride. While you're studying, you get to learn so much about so many different financial topics. In our careers, we all become somewhat siloed, focusing on just a few areas. So the CFA curriculum may be the only opportunity you get to study certain niche topics.