



# CFA Society Mississippi Member Spotlight

**Kellon Lawrence, CFA, CFP**  
*Senior VP, Portfolio Mgmt.,  
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Kellon Lawrence is a financial advisor at Morgan Stanley. Prior to joining the firm, Kellon spent nearly five years as a Securities Analyst with Southern Farm Bureau Life Insurance Company, where he managed the firm's mortgage backed securities and equity portfolio. A graduate of Mississippi State University, Kellon holds a Bachelor's degree in Business Administration, with a focus on finance and economics. He also holds a Master's of Business Administration from MSU. Kellon and his wife, Rae Ann, live in Jackson with their four children — Vera, Eleanor, Millie, and Kellon Jr. — and are members of First Presbyterian Church. In his free time he likes to play plenty of tennis, hunt or spend time with his family and friends.

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

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

My parents had quite an impact. My mom helped nourish my faith, and my dad had a big impact on my interest in finance. Also, I have always had a diverse group of friends which gave me different perspectives.

## **What made you decide to pursue the CFA charter?**

I knew from an early age I wanted to be in the investment business, and was consistently told by people I looked up to that it was the gold standard to get a leg up in the industry. I am also a finance nerd and wanted to learn as much as possible.

## **What do you enjoy most about your current professional role?**

I still love the process of investing money as it is intellectually engaging, but I'd have to say the relationships I have with my clients is the best part of my current role. I'm not very extroverted, so it still surprises me that I like this part of the job. I have some amazing clients.

## **What is the best advice you've ever received?**

In an extremely competitive environment, I had a colleague remind me there is a ton of business out there if you are willing to work hard and go get it. Don't sweat the small stuff, and don't take yourself too seriously.

## **What motivated you to join CFA Society Mississippi?**

Being around a group of people that share my passion for finance in MS!

## **What advice would you give a current or potential candidate?**

Get a job and get good at it, and don't worry about the money at first. If you produce results opportunities will present themselves. Oh, and take as many practice tests as possible!