Blair's Story

We're thrilled this month to add Blair duQuesnay as an advisor at RWM. Blair has a wide range of experience in the financial services industry from starting her own firm to working with clients and families on their financial plans to writing long-form investment research pieces. Blair is a Certified Financial Planner (CFP) and has the CFA designation, as well, giving her a well-rounded background in financial planning and investment management. I've know Blair for a few years now and I'm glad she'll be joining me on our firm's investment committee. She's a perfect fit for our organization.

Since she will be spending more of her time writing, Blair wrote a short introduction piece on her background and how she got here for those who are unfamiliar with her work.

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My journey to Ritholtz Wealth Management is a long and wild ride of a story. In my first job as a sales assistant at a Manhattan brokerage firm, Barry Ritholtz was a client. I eventually was laid off from that brokerage firm in the depths of the financial crisis. What I thought was a major career failure turned out to be the best thing that ever happened to my career. I was quickly hired by an RIA firm and went on to learn investing and financial planning from some of the most talented individuals in the business. I later moved to New Orleans, briefly founded my own RIA, and spent five wonderful years as the CIO of ThirtyNorth Investments.

In 2011, I started using Twitter and began following Josh Brown. When I first heard he teamed up with Barry, I was intrigued. We met in real life and were on the same 40 Under 40 list in 2015.

At the first EBI conference in New York, I met Ben Carlson. He moderated a panel I was on about creating Organizational Alpha. I was already a casual reader of Ben's blog, but meeting him in person, it was obvious he had a special talent for transforming complicated, disparate information into clear, coherent messages.

There are a few more steps along my journey, but you get the picture; there were many strings pulling me towards the firm. As a financial planner and investment advisor, I enjoy finding the right solutions for clients and, more importantly, forging long-term relationships built on trust. Like others in the firm, I am committed to life-long learning. I'm currently pursuing a master's in financial planning during my free time. The art and science of investing is a relatively new academic field, and I believe we've only scratched the surface in our field.

One topic that I'm most passionate about is raising standards for those who give investment advice to individuals, non-profits, family offices, and endowments. Unlike other trusted professionals, such as doctors, lawyers, and accountants, investment advisors have yet to form a real profession. It is my hope that one day soon, providing financial advice will require postsecondary education, rigorous credentialing, apprenticeship, and continuing education.

While I'm working to set up my own blog, I'll be guest posting here and on the other RWM sites. I'll be participating in a panel at EBI West in a few weeks discussing the future of investment advice. I look forward to working with this incredible dream team of advisors. For now, you can follow me on Twitter. Cheers!

Read more here:
CIO of women-led RIA joins Ritholtz as financial advisor (Citywire)