



Betsy has worked in the securities industry since 1972 and with CFI since 1996, where she is responsible for overseeing the extensive due diligence performed by CFI's credit department. She has been and continues to be actively involved in the community through affiliations with organizations such as the National Federation of Municipal Analysts and California Society of Municipal Analysts. Betsy is currently a member of the Municipal Securities Rulemaking Board's (MSRB) Investor Advisory Group, which provides the MSRB board with additional expertise on municipal market practices, transparency, and investor protection issues. In addition, she is an instructor with the Fixed Income Academy, an online training program designed to enhance market participants' knowledge, technical skills, and confidence to better navigate the complexities of the fixed income markets. In addition to previously being CFI's Compliance Officer, Betsy was formerly an arbitrator for the MSRB and has instructed numerous investment professionals with respect to SEC, FINRA, and MSRB regulations.

Betsy earned a degree in Economics from the University of Redlands and has also completed advanced studies through UCLA, UCI, and AIMR, the Association for Investment Management and Research.

Her current responsibilities include the oversight of CFI's credit assessment and monitoring practices. In this capacity she researches, evaluates, and monitors client assets; performs impact analyses on regulatory, judicial and legislative issues; and maintains CFI's extensive credit database. Additionally, she routinely interfaces with clients with regard to their portfolio assets, investment strategies, and other needs.