

Are You a Great Equity Research Analyst?

About our speaker:

James Valentine, CFA, is author of *Best Practices for Equity Research Analysts*, founder of AnalystSolutions and a former top-ranked analyst. As an analyst, the major North American investor polls ranked James Valentine among the top 3 for 10 consecutive years in his sector. Forbes identified him as one of the top 3 among all 2,000 U.S. sell-side analysts. At the height of a highly-successful career as an analyst, he was asked to take on a newly-created role as Director of Training for Morgan Stanley's Global Research department. After successfully implementing a new training program for 500 analysts and associates around the world, he decided to leave the comfort of his position – to help even more analysts. He wrote the best-selling book *Best Practices for Equity Research Analysts* and founded AnalystSolutions to help analysts apply best practices for creating and communicating alpha-generating ideas.

