

Candidate Summary – Alok Sood

I am a CFA charter holder and have been a member of CFA Society New York since 2020. During this time, I have deeply valued the Society's commitment to ethics, education, and advancing the investment profession. The Society has played an important role in my own development, and I have enjoyed engaging with the community and mentoring younger professionals who are building their careers in finance.

My academic and professional background reflects a blend of technical depth and financial expertise. I started my career as a computer science engineer and later earned my MBA in Finance from Columbia Business School. This combination has shaped the way I approach leadership, problem-solving, and innovation—grounding my work in analytical rigor, ethical decision-making, and a strong understanding of how technology can enhance investment processes.

After completing my MBA, I worked as a research analyst at hedge funds including Robeco Investment Management and ThinkStrategy Capital. This experience gave me a strong foundation in fundamental research, portfolio construction, and the day-to-day needs of investment teams. It also provided valuable insight into how data, tools, and technology can meaningfully improve investment decision-making.

Today, I serve as Head of Finance Technology at Blue Owl Capital, where I lead the strategy and execution of technology platforms that support our Finance, Operations, and Investment teams. Prior to Blue Owl, I held leadership roles at PGIM Investments, Wellington Management, and other investment firms. Across these roles, I have focused on building data, analytics, and reporting capabilities that help portfolio managers, analysts, and finance professionals make better, more informed decisions. Much of my work centers on data governance, AI-enabled reporting, and responsible innovation—areas that are increasingly important to the future of our profession.

I am running for the Board because I believe CFA Society New York is uniquely positioned to lead during a period of rapid transformation. Technology—especially artificial intelligence, automation, and data-driven investing—is reshaping how we research, analyze, and serve clients. With these changes come both opportunities and responsibilities. Members are looking for guidance on how to adopt new technologies in ways that enhance transparency, fairness, and trust, while staying grounded in the fiduciary principles that define our profession.

If elected, I would bring my experience in ethical AI, data governance, and cross-functional leadership to help the Society strengthen its programming, expand its reach, and stay ahead of emerging trends. I am passionate about helping our community understand how to use technology responsibly and effectively, and I believe the Society can play a critical role in shaping the future of our industry.

I would be honored to contribute to CFA Society New York's next chapter and support its mission of advancing the highest standards of professionalism and integrity in the investment community.