

Sameer Somal, CFA, CAIA, CFP®
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EXPERIENCE

Blue Ocean Global Technology <i>Co-Founder & CEO</i>	New York, NY 2012 – Present
Girl Power Talk <i>Co-Founder, Chief People Officer & Board Member</i>	Chandigarh, India 2017 – Present
Grupo YaQuedó <i>Managing Director</i>	Mexico City, Mexico 2019 – Present
Blue Ocean Global Wealth <i>Co-Founder & CFO</i>	Washington, DC 2012 – 2020
The Bank of Nova Scotia <i>Investment Strategy Group</i>	Toronto, Canada 2011 – 2012
Merrill Lynch & Co. Inc. <i>Financial Advisor & Technology Intermediary</i>	Princeton, NJ & New York, NY 2006 – 2010
Morgan Stanley <i>Global Wealth Management</i>	Doylestown, PA 2005 – 2006
Adviser Compliance Associates <i>Regulatory Compliance</i>	Washington, DC 2003 – 2004

BOARD SERVICE, ASSOCIATIONS & EDUCATION

CFA Institute <i>Host of Topic @ Hand, Speaker, Board of Regents, Examinations Senior Grader & Speaker</i>	Charlottesville, VA 2009 – Present
Legal Marketing Association <i>Education Advisory Council, 2030 Task Force, Speaker</i>	Chicago, IL 2019 – Present
CFP Board <i>Council on Education, Women's Initiative (WIN) Advocate, CE Sponsor & Speaker</i>	Washington, DC 2009 – Present
CAIA Association <i>Speaker & Member</i>	Boston, MA 2011 – Present
Women Economic Forum <i>Advisory Executive Council (AEC)</i>	New Delhi, India 2016 – Present
The Future Business Leaders of America-Phi Beta Lambda <i>National Board Member</i>	Reston, VA 2022 – Present
iPlan Education Institute <i>Board of Directors</i>	New Delhi, India 2013 – Present
College Possible <i>Board of Directors</i>	Philadelphia, PA 2018 – Present
R.J. Leonard Foundation <i>Board of Directors</i>	Doylestown, PA 2015 – 2019
Financial Planning Association <i>FPA Philadelphia Board of Directors, Audit & Membership Committee</i>	United States 2011 – 2018
Georgetown University, McDonough School of Business	Washington, DC

AWARDS

- CFA Institute Inspirational Leader Award – 2022
- Business Elite 40 under 40 – 2020
- Women Economic Forum: Iconic Leader – 2017
- Investment News 40 under 40 – 2014

Expert Witness Case History Includes

- Vilma Nokaj v. North East Dental Management, LLC, formerly known as Garden State Dental Management, LLC, d/b/a Family Dental Group, Dr. Michal Gelbart, Dr. Fred Friedman, Dr. Lawrence Stein, Virginia Wicke, Carolyn Totillo, Justine Antonatos, and Maria Farides
Also referred to as Nokaj v. NEDM, et al
Court: United States District Court, Southern District of New York
- Atmosphere Hospitality Management, LLC, v. ZelJkaCurtullo, Shiba Investments Inc., and Karim Merali
Court: United States District Court, South Dakota Western Division
- Iryna Boyko v. Benny The Bum’s Restaurant and Vladimir A. Mosendz
Court: Court of Common Pleas Philadelphia County
- K.G.S., individually, and as Guardian and Next Friend of Baby Doe v. Thehuffingtonpost.com, Inc., d/b/a The Huffington Post; MirahRibben; David G. Kennedy; The Kennedy Law Firm; Amber Geislinger; WALA-TV; Meredith Corp.; WBRC, LLC; Raycom Media, Inc.; and Fictitious Parties “A-Z,”
Court: Circuit Court of Jefferson County
- Susan Edwards v. Aegis Wealth Group, LLC dba Everspire, and Gerilyn Merrill
Court: Third Judicial District Court, Salt Lake County, State of Utah
- Christopher Brown v. Damon Dash; Poppington LLC d/b/a Dame Dash Studios; The Dash Group LLC; and Raquel Horn
Court: United States District Court, Central District of California
- Monique Bunn v. Damon Anthony Dash, Dame Dash Studios d/b/a Poppington LLC, Raquel Horn and The Dash Group LLC
Court: United States District Court, Southern District of New York
- Adam M Ludwin, Esq., Ludwin Law Group, P.A., & Joanna Zeitlin, Plaintiffs v. Matthew B. Proman, A/K/A Matt Proman
Court: United States District Court, Southern District of Florida
- Lawrence A. Dordea v. Maggie Freleng, Obsessed Network, LLC., Sue L. Gless Thorne, John W. Hardin & Jason C. Baldwin
Court: Court of Common Pleas, Civil Division, Stark County, Ohio

Recent Articles Authored:

[Defamation of Character and Emotional Distress Damage Charges \(Blue Ocean Blog\)](#)
[5 Lessons To Learn From Famous Corporate Reputation Crises \(Worth\)](#)
[How to Prove Defamation and Calculate Damages? \(Blue Ocean Blog\)](#)
[Protecting Your Reputation in a Post Fact-check World \(Reputation Today\)](#)
[Investing In Online Reputation Management Is No Longer Optional \(Blue Ocean Blog\)](#)
[Case Study: Helping CEOs Protect and Rebuild Their Reputation \(Blue Ocean Blog\)](#)
[The Nuances of Digital Transformation in the Emerging Digital Era \(New Starups\)](#)
[How Businesses Can Build, Monitor, and Repair Their Online Reputation \(Bplans\)](#)
[GameStop, Artificial Intelligence, Social Media, and the Future of Investing \(CFA Institute\)](#)
[Online Brand Management During the Coronavirus Pandemic \(Startup Info\)](#)
[When to Use Big Data — and When Not To \(CFA Institute\)](#)
[Building & Protecting Your Digital Presence During the COVID-19 Pandemic \(GoodFirms\)](#)
[Your Online Reputation: 7 Things CEOs Must Know \(Blue Ocean Blog\)](#)
[Aiming For A Digital Transformation? Don’t Forget Your Online Reputation \(Chief Executive\)](#)
[Why People Drive Artificial Intelligence Today and Tomorrow \(CFA Institute\)](#)
[On-Page Optimization Lets You Take Control of Your Business Success \(ReadWrite\)](#)
[Digital Transformation: 6 Tips For Success \(Blue Ocean Blog\)](#)
[Have Controversial Opinions on The Current Crisis? Here’s How to Manage Your Online Reputation \(Real Leaders\)](#)
[Online Reputation Marketing: 7 Solid Tips for Social Media \(CoSchedule\)](#)
[The role of SEO in online reputation management \(ORM\) \(Search Engine Watch\)](#)
[Why Your Company's Online Reputation Matters \(Entrepreneur\)](#)

[Negative Press is Inevitable for Modern CEOs — And That's Not a Bad Thing \(CEO World\)](#)
[Reverse SEO for Law Firms: How to Protect Yourself and Your Clients against Negative Content \(Of Counsel – The Legal Practice and Management Report\)](#)
[How to Manage Fake Reviews on Google, Facebook, and Glassdoor \(The Manifest\)](#)
[Online Reputation Management and Why It's Important \(Business.com\)](#)
[Digital Reputation Management 101 \(CFA Institute\)](#)
[Online Reputation Management Guide \(Social Media Examiner\)](#)
[How to Improve or Restore Your Online Reputation \(Social Media Examiner\)](#)
[Sameer Somal On The Digital Revolution Of The Internet \(Attorney at Law Magazine\)](#)
[Case Study: Why Efficient Online Reputation Repair Involves More Than Content Suppression \(Experts.com\)](#)

CFA Institute Experience

- Member of the CFA Institute global [approved speaker list](#). Recent global CFA engagements include Colombia, Netherlands, Cayman Islands, Cleveland, Orange County, Calgary, Louisville, Nebraska, Americas SLC, South Florida, Naples, Edmonton, Vietnam, Mexico City, Austin, San Antonio, Dallas, Houston, Pittsburgh, Vermont, Bangladesh, Tennessee and Chicago. [Sample references](#).
- Host of the CFA Institute talk show, entitled The Topic @ Hand. ([photo shared on twitter](#) from CFAI Studios).
- Member of the Board of Regents for the CFA Institute's Seminar for Global Investors.
- [Contributing author](#) at CFA Institute's Enterprising Investor Blog.
- Senior Grader of CFA exams (8 years).
- Engaged for special projects, including: [CFA Institute: Why We Volunteer | Sameer Somal](#) & [CFA Program Success – 10 Timeless Tips For the CFA Charterholder Exams | Sameer Somal, CFA](#)

Recent Speaking Engagements Include:

- InterCon USA (Las Vegas, NV)
- Legal Marketing Association (Orlando, FL)
- Empowering A Billion Women (Austin, TX)
- Legal Marketing Association (Philadelphia, PA)
- CFA Institute VBA Netherlands (Amsterdam, Netherlands)
- Clear Law Institute (Arlington, VA)
- Benchbar Conference (Atlantic City, NJ)
- Legal Week (New York, NY)
- Mobile Growth Summit (New York, NY)
- Dimensional Fund Advisors (Chicago, IL)
- Scotiabank (Cayman Islands)
- Philippines HR Summit (Manila, Philippines)
- U.S. Department of State (Washington, D.C.)
- Project Management Institute (San Fernando Valley, CA)

Continuing Legal Education (CLE) Programs:

- CLE Presentation 1: Using Social Media Effectively and Ethically in Your Law Practice 2019
- CLE Presentation 2: Introduction to Online Reputation Management for Attorneys & Clients
- CLE Presentation 3: Advanced Online Reputation Management for Attorneys & Clients

Public References Available: <https://www.linkedin.com/in/sameersomal/>