

2024

ANNUAL REPORT

COMMUNITY • COMPETENCY • CONTENT • CONNECTION



CFA Society
Toronto



Table of Contents

Chair & CEO Messages	3
About Us.....	4
Events & Programing	6
Member Services	8
University & External Outreach	9
Awards & Celebrations.....	10
Leadership & Strategic Partners	11
Our Volunteers.....	12
Our Sponsors	14
Our Strategic Plan	15





Reflecting on the past year, I am immensely proud of the significant strides CFA Society Toronto has made in advancing our mission and serving our members. Our community has grown to over 11,500 members, with 807 new professionals joining us – a testament to the trust and value that finance and investment professionals place in our Society.

We enhanced our events and programming, delivering 51 high-impact events attended by 3,457 professionals. These events provided deep insights into critical industry topics and facilitated valuable peer connections. By offering timely and relevant content, we have empowered our members to stay ahead in a rapidly evolving industry.

Our Mentorship Program expanded by 15%, nearly reaching 60 mentor-protégé pairings. This growth underscores our commitment to nurturing future industry leaders and fostering a culture of knowledge sharing within our community.

Promoting diversity and inclusion has been a significant focus. Through events like our 3rd Annual Women in Finance Conference, and our first-ever strategic partnership with VersaFi (formerly WCM), we have amplified our impact on critical issues within the industry. This collaboration marks a milestone in championing diversity, equity, and inclusion, reinforcing our position as a leader in the finance and investment sector.

The accomplishments detailed in this Annual Report result from the collective efforts of our dedicated members, passionate volunteers, and supportive sponsors. Your engagement and contributions have been instrumental in driving our success. Together, we celebrated numerous awards and recognitions that honour excellence among our members and future professionals, elevating the standards of our profession.

As we build on this momentum, I am confident that CFA Society Toronto will continue to thrive and make a positive impact in the investment and financial services industry. Thank you for your unwavering commitment and for being an integral part of our journey.

Warm regards,

Brian Madden, CFA
Chair, Board of Directors,
CFA Society Toronto
Chief Investment Officer,
First Avenue Investment Counsel



As we look ahead, I am excited to share our vision for the future of CFA Society Toronto. Our newly approved three-year strategic plan sets a clear roadmap for advancing our new North Star of growing and enhancing our dynamic member community.

Our strategic focus centers on three key pillars:

- **Member Experience:** We are committed to delivering an outstanding, highly personalized member experience. This includes introducing new learning formats, expanding online engagement platforms, and tailoring resources to support your career growth. Recognizing that each member's journey is unique, we aim to provide the tools and opportunities that will help you succeed.
- **Influence & Impact:** We aim to amplify our influence within the investment and financial services industry. By leveraging digital media and collaborating with strategic partners, we will offer exclusive learning opportunities and elevate the profile of our Society and its members. Our goal is to position CFA Society Toronto as a thought leader and advocate for the highest standards of ethics and professional excellence.
- **Operational Excellence:** Pursuing excellence in our operations is essential. We will revamp our volunteer programs to offer more flexible and meaningful engagement opportunities and refresh our website for an improved user experience. By enhancing our operational efficiency, we can better serve you and adapt to the evolving demands of our industry.

I encourage you to explore the details of our strategic plan on Page 15 of this report, where you'll find more information about our initiatives and how they will benefit you directly.

Our commitment to you includes continuously seeking ways to add value to your membership through innovative programs and services. Fostering a strong, connected community remains a priority because we believe that together, we can achieve greater success. In a rapidly evolving industry, we're dedicated to staying ahead of trends and ensuring our offerings meet your changing needs.

I invite you to join us on this exciting journey as we work together to shape the future of finance. Your participation and feedback are vital as we implement our strategic initiatives.

Thank you for your continued support and commitment to CFA Society Toronto.

Sincerely,

Frederick Pinto, CFA, ICD.D
Chief Executive Officer
CFA Society Toronto

Who We Are

CFA Society Toronto is one of the world's largest Societies of CFA® Charterholders, dedicated to supporting the professional and business development of over 11,500 members. Our diverse community consists of members from both institutional and retail arenas, active in various roles including portfolio management, trading, research analysis, financial advising, and consultancy.

We are dedicated to fostering a community where members can thrive professionally. Through our programs and initiatives, we offer opportunities for continuous learning, networking, and leadership development, empowering our members to excel in a dynamic and competitive global market and ensuring they remain at the forefront of the industry.

Founded in 1936, CFA Society Toronto is a not-for-profit organization affiliated with CFA Institute, the global body that administers the Chartered Financial Analyst (CFA) curriculum and sets voluntary, ethics-based performance-reporting standards for the investment industry.



Our Vision

The leading source of world-class investment professionals.



Our Mission

Creating opportunities for our members to raise standards and make high-quality contributions toward a trustworthy financial community.



Our North Star

To enhance and expand our diverse community to promote an ethical, dynamic, and vibrant investment and financial services industry.

Our Community at a Glance

Being part of CFA Society Toronto means joining a network of professionals committed to excellence and integrity.

11,583

Total Members

807

New Members

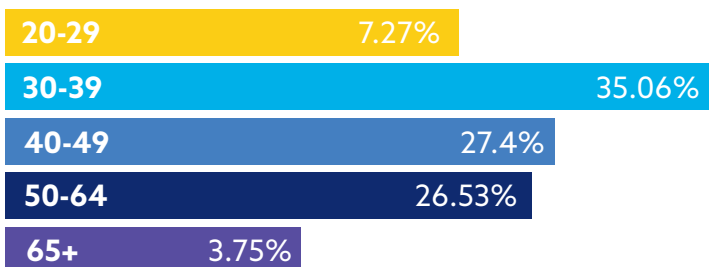
265

Volunteers

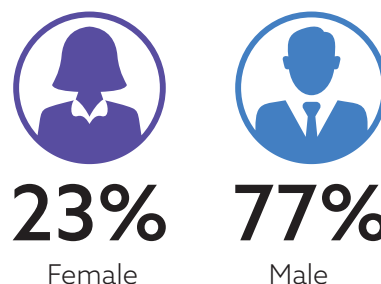
3,000+

Volunteer Hours Contributed

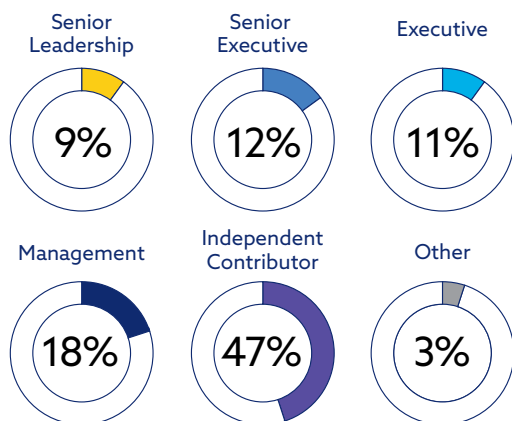
Age Distribution:



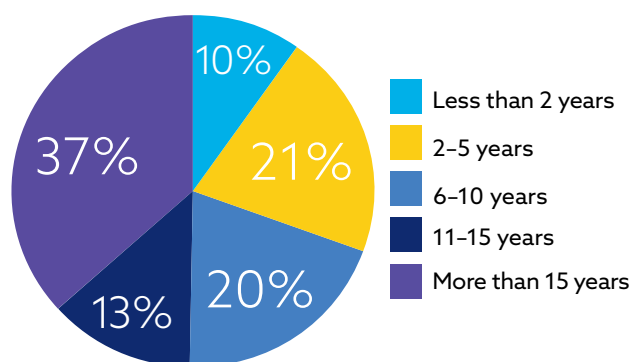
Gender Breakdown:



Job Levels:



Membership Tenure:



Top 10 Employers of CFA Charterholders

1. RBC
2. TD Bank
3. BMO
4. CIBC
5. Scotiabank
6. CPP Investments
7. Manulife
8. OTPP
9. Sun Life
10. National Bank

Driving Insights and Connections

Each year, CFA Society Toronto delivers high-impact events that offer industry-leading insights, professional development, and unparalleled networking opportunities. These events are designed to empower our members with knowledge, skills, and connections that propel their careers forward.

2023-2024 Events at a Glance

Our events provide members with access to world-class thought leaders, ideas and insights, and peer networking opportunities that are critical for professional growth.



51

Total Events



113

Guest Speakers



3,457

Total Attendees



60.75

Professional Learning Credits Offered

2023 Annual Wealth Conference

September 21, 2023

A thought leadership conference geared for wealth managers, financial planners, and investment advisors, providing actionable strategies and insights into adapting to industry changes.

Attendees: 104

Speakers: 9

Testimonial: "AI was great. Really enjoyed that part. The whole day was very well done."



Annual Equity Symposium



Annual Investment Dinner

66th Annual Investment Dinner

October 4, 2023

Our flagship event, and Canada's largest event of its kind, gathering financial community leaders for an evening of thought leadership, networking, and celebration.

Attendees: 724

Speakers: 3

11th Annual Equity Symposium

January 25, 2024

A dynamic, half-day conference that brings together leading portfolio managers for rapid-fire presentations on market outlooks, new investment ideas, and insights into investment practices.

Attendees: 137

Speakers: 11

3rd Annual Women in Finance Conference

March 7, 2024

A trailblazing conference covering diversity, inclusion, and leadership in the finance sector, packed with inspirational stories, industry best practices, and practical advice for career advancement.

Attendees: 124

Speakers: 14

Growth from Previous Year: 110.2%

Testimonial: "The fireside chat was spectacular! It touched on key obstacles to empowerment with an honest and motivating undertone."



Annual Women in Finance Conference



Annual Pension Conference

Sustainable Investing Symposium

April 10, 2024

A half-day conference exploring the latest trends and successful strategies for sustainable investing, social responsibility, and ethical governance.

Attendees: 60

Speakers: 13

Testimonial: "All the panels and speakers were very interesting. It was very valuable to attend."



Sustainable Investing Symposium

18th Annual Pension Conference

April 25, 2024

A popular conference providing insights and thought leadership into pension management challenges and solutions.

Attendees: 220

Speakers: 20

Growth from Previous Year: 61.76%

Testimonial: "An excellent event!"

Annual CFA Charter Recognition

May 31, 2024

An annual event celebrating our newest CFA® Charterholder members.

Attendees: 415

Speakers: 2

Testimonial: "It was nice to have multiple opportunities to meet new people. This was a great event!"



Annual CFA Charter Recognition

Future Leaders Forum

June 11, 2024

An exceptional forum designed to enhance leadership skills, equipping emerging leaders with the tools and knowledge to become effective managers and executives.

Attendees: 81

Speakers: 9

Testimonial: "All the speakers shared examples of leadership and relevant tactics that the audience could take away."

Scan QR code to find out about our upcoming events



Empowering Our Members

CFA Society Toronto is committed to helping members cultivate meaningful connections and establish themselves as leaders within the investment community. Our member services are tailored to support our members' professional journeys, providing resources and opportunities that enhance their skills, knowledge, and network. Through a comprehensive range of initiatives, programs, and publications, we ensure our members have access to timely and relevant professional and career development opportunities.

Mentorship Program

Our Mentorship Program connects senior charterholders with emerging professionals to pass on valuable knowledge and experience to the next generation of the investment community. Protégés receive personalized guidance, industry insights, and career advice, accelerating their professional growth, while mentors develop leadership skills, give back to the community, and stay connected with emerging industry trends. In 2023, we nearly reached 60 mentor-protégé pairings, marking a 15% increase from last year!

Mentors: 57

Protégés: 57

Gender Breakdown:

Male 74%, Female 26%

Experience Levels:

Mentors:

33% with 20+ years,

67% with 10–20 years

Protégés:

16% with 10+ years

27% with 5–10 years

Remainder less than 5 years

Top Occupational Roles:

Director, Analyst, VP, Manager, Associate

Testimonials:

"My experience with the mentorship program has been nothing short of transformative. Through the guidance of my mentor, I gained invaluable insights tailored to my unique career journey."

"Whether offering career advice, industry insights, or providing constructive feedback, my mentor played a pivotal role in shaping my professional growth and development."

Day in the Life Speaker Series

Our Day in the Life Speaker Series hosted eight sessions in 2023, including two in-person events with networking opportunities. This series provides members with firsthand insights into various roles within the investment industry, helping them make informed career decisions while offering opportunities to connect with professionals and peers to expand their professional networks.

Events: 8

Speakers: 8

Attendees: 454

Testimonial:

"Very informative. Good insights on the role and insightful speaker!"

The Analyst Publication

Our quarterly publication, *The Analyst*, delivers relevant and timely topics to keep our members at the forefront of industry trends and regulations. By providing access to expert analyses and thought leadership articles, it enhances members' knowledge on emerging topics and best practices, supporting their professional development within the investment community.

Articles Published: 37

Contributing Writers: 17

Readership: 14,244

Knowledge Network Directory

Our Knowledge Network Directory is an on-demand service that provides members with access to expert insights on industry and professional development questions. By connecting with seasoned professionals, members receive expert guidance on specific challenges and facilitate peer learning, fostering knowledge sharing within our community.

Experts Available: 34

Career Centre

Our Career Centre is a member service where employers post opportunities specifically targeted to CFA charterholders and finance professionals. It provides members with access to job postings tailored to their qualifications, facilitating career advancement. The platform also enhances visibility by connecting members with top employers seeking qualified professionals, supporting their professional growth within the industry.

Jobs Posted: 73

Hiring Companies: 39

Impressions: 42,383

Users: 7,564



Nurturing Future Professionals

CFA Society Toronto is committed to fostering the next generation of finance professionals. Through our outreach initiatives, we provide students and candidates with resources, mentorship, and opportunities to connect with industry professionals.

University Outreach

Our University Outreach program creates meaningful partnerships with local universities and colleges through outreach initiatives, ambassador programs, and sponsorships. This program offers students valuable insights into the finance industry and the benefits of obtaining the CFA designation. At the same time, it provides our members with opportunities to volunteer as leaders or mentors, enhancing their leadership skills and engaging with the next generation of finance professionals.

- Student Ambassadors:** 29
- Partner Schools:** 13
- Presentations Delivered:** 11
- Awards Granted:** 6

Participating Institutions:

- Humber College
- McMaster University
- Ontario Tech University
- Queen's University
- Toronto Metropolitan University
- University of Toronto Mississauga
- University of Toronto Rotman
- University of Toronto Scarborough
- University of Waterloo
- University of Windsor
- Western University
- Wilfred Laurier University
- York University

University Sponsorship Program

Through our University Sponsorship Program, we create awareness of the CFA Program by providing resources and sponsorships for university club events and initiatives. This not only strengthens our relationships with students but also helps identify and nurture future industry professionals, contributing to a robust talent pipeline within the finance industry.

- Applications Received:** 35
- Events Sponsored:** 19

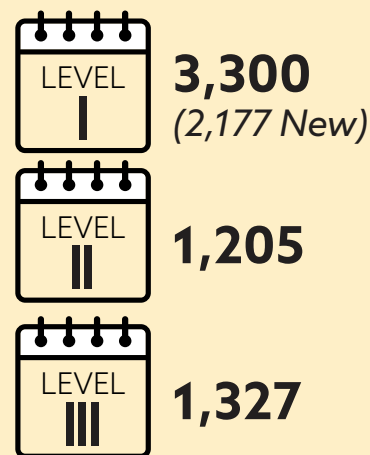
External Outreach

Our External Outreach initiatives focus on building engagement and connectivity within Toronto's finance and investment community. By strengthening relationships with key organizations, we expand opportunities for collaboration and advocacy, enhancing our industry's influence. These efforts facilitate B2B relationships that can lead to strategic partnerships and promote the CFA Program.

- Meetings Conducted:** 35
- Companies Engaged:** 10

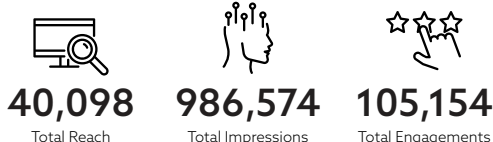
Candidate Engagement

Our Candidate Engagement Program provides resources and communications to help candidates succeed in the CFA Program. By supporting candidates throughout their journey, we foster community building and encourage them to become active members upon completion.



Marketing Reach

Our marketing initiatives expand our Society's reach, enhancing visibility for our members and partners.



Public Relations Reach



Our PR activities generated almost 2 million positive media impressions across print, online, and radio outlets!

Honouring Excellence

CFA Society Toronto celebrates the achievements of our members and future professionals, recognizing excellence in the finance industry.

2024 Hillsdale Investment Management – CFA Society Toronto Research Award

Recognizing excellence in the field of investment research and fostering a rich exchange of insights that benefits the entire investment community.

Sponsored by:

Hillsdale Investment Management (www.hillsdaleinv.com)

This year's winners:

Dr. Kodjovi Assoe, CFA, Professor of Finance, Université du Québec à Montréal

"The recognition and credibility that come with this award will undoubtedly open doors to new opportunities and advancements."

Dr. Najah Attig, Professor of Finance and Chair of the Department of Finance at Dalhousie University

"As a recipient of this award, we are honoured to be recognized for our contributions in the field."

Dr. Oumar Sy, Professor of Finance at Dalhousie University

"This award signifies the culmination of countless hours of in-depth research and dedication. It serves as a testament to the impact and significance of our work and validating our efforts."



Undergraduate Finance & Economics Awards

The Undergraduate Finance & Economics Awards recognize top third- and fourth-year students, nurturing future finance professionals and building awareness of the CFA Society Toronto brand among emerging leaders.

Third-year recipients:

Cora Usurelu, David Di Santo, Emma Saganowich

Fourth-year recipients:

Alton Loveys, Carter Morrison, Michelle Chou

CFA Societies Canada Ethics Challenge

A competition aimed at raising students' awareness of ethical dilemmas in investment management, offering practical training and mentoring on real-world challenges.

CFA Society Toronto Ethics Challenge - Local Winning Team:

University of Waterloo: Harman Bartia, Renuka Ravinder, Terry Kuang, Xavier Toney, Julia Pereira do Amaral

CFA Institute Research Challenge

An annual global competition offering university students hands-on mentoring and training in financial analysis and ethics. Participants develop analytical, valuation, report writing, and presentation skills, gaining real-world experience as research analysts.

Winning Team:

University of Waterloo: From left to right: Coco Dai, Ryan Trainor, Arnav Sheth, Aryaman Dhillon, Ronis Goel



Volunteer Awards

Honouring the volunteers who dedicate their time and expertise, our Volunteer Awards celebrate their invaluable service, impact and inspire community involvement.

Volunteer Spirit Awards:

Lynn Wang, CFA, Awards & University Relations Committee
Joseph Lo, CFA, Corporate Finance Committee
Ming Yeung, CFA, External Relations Committee
Garvin Deokiesingh, CFA, Finance & Audit Committee
Kevin Fahey, CFA, Governance & Nominations Committee
Viveck Panjabi, CFA, Industry Relations & Corporate Governance
Moe Nalla, CFA, Institutional Asset Management Committee
Anthea Yao, CFA, Membership Committee
Mark Timm, CFA, Member Communications Committee
Michael Brown, CFA, Mentorship Committee
Mike McEown, CFA, Private Wealth Management
Erica Gai, CFA, Professional Development Committee
Zaki Khan, CFA, Project Volunteers

Student Ambassador:

Sammi Xu & Aadi Bharadwaj, York University

Spotlight Awards:

Morgan Pampe, Private Wealth Management Committee
Jason Parker, Mentorship Committee



Our Leadership Team

Our dedicated leadership team steers the Society towards achieving its mission and vision.

Board of Directors 2023-2024



Brian Madden, CFA,
Chair



Heather Cooke, CFA,
Vice Chair



Mari Jensen, CFA,
Past Chair



Bobby Thompson, CFA,
Treasurer



Sadiq Alladina, CFA,
Director



Sebastian Becerra, CFA,
Director



Karl Cheong, CFA,
Director



Sarim Farooqi, CFA,
Director



Audrey Gan, CFA,
Director



Jenifer Rush, CFA,
Director



Kar-Wei Lam, CFA,
Director



Minal Upadhyaya, LLB,
Secretary



Frederic Pinto, CFA,
CEO & Director

Strategic Partners

We collaborate with other leading organizations to enhance our offerings and provide additional value to our members.

- AIIMA
- CFA Societies Canada
- Financial Modeling Institute
- Industry Standards Reporting
- Kaplan
- Markets Group
- Ontario Securities Commission (OSC)
- Research Council (ISRR)
- Rock the Street, Wall Street
- Toronto Association for Business and Economics (TABE)
- VersaFi (formerly WCM)

Staff Members

Our staff works tirelessly to deliver programs and services that benefit our members.

Frederick Pinto, CFA, ICD.D, CEO

Norma Summers, COO*

Kenny Chan, Director, Marketing & Communications

Breanne Cheeseman, Senior Associate, Education & Events

Ha Viet Ha, Education & Events Associate

Karin Koo, Office & Membership Administrator

Nyssa Lawson, Candidate & University Outreach Associate

Meredith Lowry, Senior Manager, Education & Events

Aaron Ly, Corporate Relations & Business Development Manager

Alexandra Pegg, IT Manager

Casey Pope, Manager, Leadership & Project Support

Leslie Venturo, Volunteer Relations Manager

Jessi-Lyna Wan, Manager, Marketing & Communications

Valerie Weddell, Director, Operations

Jenny Yeo, Director, Member Events & Experience

*On Leave.

The Heart of Our Community

Our incredible volunteers are the driving force behind our success, going above and beyond to help us reach new heights.

Thank You to
Our 2023-2024
Volunteers



265
Total
Volunteers



3,000+
Volunteer Hours
Contributed

Volunteer Committees:

Awards & University Relations Committee

Stephanie Poon, *CFA, Chair*
Michael Porto, *CFA, Vice Chair*
Kiana Xu, *CFA*
Daniella Auerbach, *CFA*
Kevin Zhou, *CFA*
Jimmy Huang, *CFA*
Kevin Veenstra, *CFA*
Madiha Javed, *CFA*
Michael Wang, *CFA*
Mohsin Bashir, *CFA*
Otto Yung, *CFA*
Lynn Wang, *CFA*
Sanjiv Sawh, *CFA*
Tamy Chen, *CFA*

Corporate Finance Committee

Viktor Russu, *CFA, Chair*
David Harris, *CFA, Vice Chair*
Angha Gupta, *CFA*
Min Huang, *CFA*
Sohail Chagani, *CFA*
Suneil Ramesh, *CFA*
Wen Lei, *CFA*

External Relations Committee

Vincent Au, *CFA, Chair*
Ming Yeung, *CFA, Vice Chair*
Aayush Mittal, *CFA*
Answerd Ramcharan, *CFA*
Audrey Gan, *CFA*
Bhawana Chhabra, *CFA*
Christopher Pearce, *CFA*
Emerson Savage, *CFA*
James Hunter, *CFA*
Neelarjo Rakshit, *CFA*
Scott Connell, *CFA*
Wanfeng Zhou, *CFA*

Finance & Audit Committee

Bobby Thompson, *CFA, Chair*
David Cluff, *CFA*
Garvin Deokiesingh, *CFA*
Sarim Farooqi, *CFA*
Lina Irawati, *CFA*
Michael Kehoe, *CFA*
Rahim Khakiani, *CFA*
Adrian Morgan, *CFA*
Lindsay Quinn, *CFA*
Tim Watson, *CFA*

Governance & Nominations Committee

Minal Upadhyaya, *LLB, Chair*
Kevin Fahey, *CFA*
Simon Frechet, *CFA*
Mari Jensen, *CFA*
Brenda King, *CFA*

Industry Relations & Corporate Governance Committee

Ritesh Patel, *CFA, Chair*
Sara Lorient, *CFA, Vice Chair*
Fatah Kadiri, *CFA*
Marie-Claude Durocher, *CFA*
Philip Young, *CFA*
Qoomail Dewji, *CFA*
Rafael Tricta, *CFA*
Victor Li, *CFA*
Tarang Agarwal, *CFA*
Viveck Panjabi, *CFA*

Institutional Asset Management Committee

Derek Walker, *CFA, Chair*
Jun Wang, *CFA, Co Vice Chair*
Mohammed Nalla, *CFA, Co Vice Chair*
Adrien Lucisano, *CFA*
Avi Zak Hooper, *CFA*
David Canale, *CFA*
Debbie Lam, *CFA*
Herbert Zhang, *CFA*
Lauretta Chame, *CFA*
Mark Bischoff, *CFA*
Mike Still, *CFA*
Yelena Stepanyan, *CFA*

Member Communications Committee

Kamran Khan, *CFA, Co Chair*
Jennifer Vieno, *CFA, Co Chair*
Walter de Wet, *CFA, Vice Chair*
Hisham Yakub, *CFA*
Rossa O'Reilly, *CFA*
Jack Bruton, *CFA*
Jindou Zhang, *CFA*
Joanna Tountas Wolff, *CFA*
Joshua Giancola, *CFA*
Kevin Zhao, *CFA*
Krystyne Manzer, *CFA*
Mark Timm, *CFA*
Moiz Divan, *CFA*
Winfred Lam, *CFA*
Sean Wang, *CFA*
Jenny Shen, *CFA*

Membership Committee

Andrew Morgan, *CFA, Chair*
Mary Anne Palangio, *CFA, Vice Chair*
Andrew Ma, *CFA*
Anthea Yao, *CFA*
Lianying (Sophie) Ren, *CFA*
Yufei Man, *CFA*
Shirley Shi, *CFA*
Nnenna Anebelundu, *CFA*

Mentorship Committee

Evgenija Makarova, *CFA, Chair*
Michael Brown, *CFA, Vice Chair*
Alexandra Zvarich, *CFA*
Anthony Badali, *CFA*
Cynthia Yu, *CFA*
Helen Yu, *CFA*
Deena Padamadan, *CFA*
Emily Cao, *CFA*
Nigel D'Souza, *CFA*
Paul Hamilton, *CFA*
Vikram Ravichndran, *CFA*

Private Wealth Committee

Wanting Zhao, *CFA, Chair*
Steph Condra, *CFA, Vice Chair*
Scott Dickenson (*Chair Sep 2023 - Mar 2024*)
Andrea McCarraher-Miljkovic, *CFA*
Bana Houry, *CFA*
Gerry Fields, *CFA*
Ian Marthinsen, *CFA*
Julie Brough, *CFA*
Linda Palin, *CFA*
Matthew Deforest, *CFA*
Michael McEown, *CFA*
Morgan Pampe, *CFA*
Scott Dickenson, *CFA*
Yufei Man, *CFA*

Professional Development Committee

Mark Lu, *CFA, Co Chair*
Becky Perry, *CFA, Co Chair*
Ling Zhang, *CFA, Vice Chair*
Christopher Hau, *CFA*
Erica Gai, *CFA*
Jason Parker, *CFA*
Jennifer Li, *CFA*
Olga Gappasova, *CFA*
Vincent Chang, *CFA*
Yvonne Bai, *CFA*

Taskforce Volunteers:

Annual Investment Dinner

Mari Jensen, *CFA*
Brian Madden, *CFA*
Heather Cooke, *CFA*
Sarim Farooqi, *CFA*
Vince Au, *CFA*
Fred Pinto, *CFA*
Jenny Yeo

Knowledge Network Directory

Ali Akber, *CFA*
 Andi Kerenxhi, *CFA*
 Colan Wang, *CFA*
 Daria Komarova, *CFA*
 Deena Padamadan, *CFA*

Project Volunteers

Adilya Kanyazova, *CFA*
 Ahmed Elfatraty, *CFA*
 Ahmed Zaki Khan, *CFA*
 Amandeep Dharwal, *CFA*
 Anand Sureshbhai Gokani, *CFA*
 Andre Fairclough, *CFA*
 Anthony Visano, *CFA*
 Azra Mirza
 Bezad Kersi Deboo, *CFA*
 Sylvia Chang, *CFA*
 Cherish Ratisai, *CFA*
 Chirag Bhailal Thakkar, *CFA*
 Christopher Pearce, *CFA*
 Dhanushka Goonathilaka, *CFA*
 Elizabeth Cwieczkowski
 Erick Brown Martinez, *CFA*
 Gaurav Kumar Hinduja, *CFA*
 Guangming Hu, *CFA*
 Ivan Yik Lung Tang, *CFA*
 Jan Onyszko-Dragan, *CFA*
 Jason Basch, *CFA*
 Jason Pereira, *CFA*
 Harry Kwan, *CFA*
 Marian Hoffmann, *CFA*
 Phomolo Rabana, *CFA*
 Nikrooz Firoozabadi
 Rafael Espana, *CFA*
 Rajeev Arora, *CFA*
 Rishabh Shah, *CFA*
 Shahrzad Shafaeianfard, *CFA*
 Shri Kant Panday, *CFA*
 Xiaobo Wang, *CFA*
 Harry Sun, *CFA*
 Grace Huang, *CFA*

Student Ambassadors

Alexandra Kozyreva
 Ana Paulina Rodriguez
 Adriel Pereira
 Alexander Toombs
 Joseph Clinton
 (Abdua) Sami Siddique
 Vlad Petrescu
 Abby Klein
 Michael Chou
 Michelle Sidrak
 MC Momot
 Curtis Quon
 Fiona Murphy-Trepanier

Gurleen Kaur
 Nicole Suszycki
 Victoria Gracie
 Emma (Xu) Wei
 Ashley (Su Ah) Kim
 Michelle (Wanyao) Wu
 Everly (Xiaoxuan) Pang
 Owen (Jialong) Niu
 Andy (Shuning) Yang
 Victor Mo
 Judy Fu
 Mayank Kohli
 Arthur Yang
 Eugene Zanone
 Aya Madi
 Aadi Bharadwaj
 Tyler Woloszak-Ng

Ethics & Research Challenge Support

Andrew Ma, *CFA*
 Harry Kwan, *CFA*
 Michael Porto, *CFA*
 Kiana Xu, *CFA*
 Sanjiv Sawh, *CFA*
 Shazia Naik, *CFA*
 Evan Chen, *CFA*
 Jing Lu, *CFA*
 Otto Yung, *CFA*
 Madiha Javed, *CFA*
 Kevin Zhou, *CFA*
 Jimmy Huang, *CFA*
 Sadiq Alladina, *CFA*
 Leila Kulbayeva, *CFA*
 Ariel Liang, *CFA*

Mentors

Hassan Ahmed, *CFA*
 Nelson Arruda, *CFA*
 Sarah Aves, *CFA*
 Anthony Badali, *CFA*
 Adam Basarab, *CFA*
 Sebastian Becerra, *CFA*
 Larry Berman, *CFA*
 Rohan Bhargava, *CFA*
 Nick Boychuk, *CFA*
 Michael Brown, *CFA*
 Chris Caldwell, *CFA*
 Emily Cao, *CFA*
 Karl Cheong, *CFA*
 Simon Dabrowski, *CFA*
 Paul Denneboom, *CFA*
 Nigel D'Souza, *CFA*
 John Ewing, *CFA*
 Ian Fung, *CFA*
 Erica Gai, *CFA*
 Joshua Giancola, *CFA*
 Brian Goldstein, *CFA*

Adam Gordon, *CFA*
 Amr Hamdy, *CFA*
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 Walter Posiewko, *CFA*
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 Daniel Sinclair, *CFA*
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 Vianne Xu, *CFA*
 Ming Yeung, *CFA*
 Dave Yoon, *CFA*
 Ethan Yu, *CFA*
 Cynthia Yu, *CFA*
 Helen Yu, *CFA*
 Alexandra Zvarich, *CFA*

Social Media

Jakub Korek, *CFA*
 Rafael Espana, *CFA*
 James Ma, *CFA*
 Drishti Thakkar, *CFA*

Adilya Kanyazova, *CFA*
 Henrik Zheng
 Grace Huang, *CFA*
 Michael Lu, *CFA*
 Marissa (Tangling) Li, *CFA*
 Haibin Tang, *CFA*
 Janet Zhang, *CFA*

Sustainable Investing Symposium

Ritesh Patel, *CFA*
 Wanfeng Zhou, *CFA*
 Laura Song, *CFA*

Volunteer Spotlight

We celebrate the exceptional contributions of our volunteers who have made significant impacts on our Society and members.

Award recipients:

- Morgan Pampe, *CFA*, *Private Wealth Management Committee*
- Jason Parker, *CFA*, *Mentorship Committee*

Scan QR code to learn more about volunteering:



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Guiding Our Future

CFA Society Toronto is excited to introduce our new three-year strategic plan—a roadmap designed to guide us toward greater impact and innovation.



Our North Star

To enhance and expand our diverse community to promote an ethical, dynamic, and vibrant investment and financial services industry.

Strategic Pillars:

1

Member Experience

Personalized Support:

Delivering tailored resources and programs that meet your specific career goals.

Enhanced Engagement:

Opportunities for deeper involvement and connection with peers.

Initiatives Include:

- Enhanced offerings and new learning formats.
- Expanded online community platforms for greater engagement and networking.

2

Influence & Impact

Industry Leadership:

Amplifying our collective voice to shape the future of finance.

Professional Recognition:

Elevating the profile of CFA charterholders in the industry.

Initiatives Include:

- Expanding our reach through digital media, including podcasts and videos.
- Collaborations with strategic partners for exclusive learning opportunities.

3

Operational Excellence

Efficient Services:

Streamlined processes for a seamless member experience.

Innovative Platforms:

Access to cutting-edge tools and resources.

Initiatives Include:

- Refreshing our website for improved user experience.
- Revamping our volunteer programs for more flexible engagement.

As we move forward, our new strategic plan sets a clear direction for our Society.

Member Experience remains our top priority. With over **11,500 members** representing a rich mix of demographics, roles, and sectors, we're committed to delivering a personalized, digital-first experience that supports your career growth and learning needs.

We are also focusing on amplifying our **Influence and Impact** within the industry, and pursuing **Operational Excellence** to enhance our services.

Thank you for being a part of our journey. Your membership and involvement are what make CFA Society Toronto a vibrant and dynamic community.

Together, we will shape the future of finance.

Stay informed and up to date on our strategic plan by scanning QR Code:





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