

SPRING NEWSLETTER

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33RD ANNUAL FORECAST DINNER

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Join Us for Atlantic Canada's Premier Financial Event—A Tradition of Insight and Expertise

CFA Society Atlantic Canada is proud to present the 33rd Annual Forecast Dinner on May 20, 2025, at the Halifax Convention Centre. This signature event brings together leading financial professionals, industry experts, and community leaders for an evening of insights, networking, and thought leadership.

Keynote Speaker: Jared Gross We are excited to welcome Jared Gross, Managing Director and Head of Institutional Portfolio Strategy at J.P. Morgan. With 26 years of investment experience, Mr. Gross provides strategic insights to institutional clients, including corporate and public pensions, endowments, and healthcare institutions. Before joining J.P. Morgan in 2020, he led institutional business development at PIMCO and held senior roles at major financial institutions.



Why Attend?

- Gain exclusive insights on the future of global markets and investment strategies
- Network with leading professionals across the financial sector
- Engage in discussions shaping the economic outlook for 2025 and beyond
- Connect directly with the keynote speaker and other thought leaders in an exclusive setting

Reserve your seat today and be part of the conversation driving the future of finance—visit [Register here](#) to register.

Message from the Board

Dear Members,

On behalf of the Board of Directors of CFA Society Atlantic Canada, we extend our sincere gratitude to our members and volunteers for your continued support and dedication. Your efforts are the foundation of our society's success, and we are proud of the vibrant community we continue to build together.

We would like to offer a special thank you to the volunteers who contributed their time and expertise to the CFA Ethics Challenge and the CFA Research Challenge. Your commitment to mentoring and supporting the next generation of investment professionals reflects the highest standards of our profession. These initiatives not only foster ethical decision-making and critical analysis but also provide an invaluable learning experience for participants.

As we look ahead, we are excited to host the 33rd Annual Forecast Dinner on May 20, 2025, at the Halifax Convention Centre. This premier event is an opportunity to connect with peers, gain insights from industry leaders, and engage in discussions that shape the future of global finance. We are honored to welcome Jared Gross, Managing Director and Head of Institutional Portfolio Strategy at J.P. Morgan, as our keynote speaker.

Looking forward, we remain committed to providing high-quality programming, professional development opportunities, and networking events to support your career growth. We encourage you to stay connected, get involved, and share your feedback as we continue to enhance the value we deliver to our members.



Thank you again for being an integral part of CFA Society Atlantic Canada. We look forward to seeing you at upcoming events and working together to advance the investment profession.

The Board of Directors
CFA Society Atlantic Canada



CONTACT US

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2025 Research Challenge

The CFA Society Atlantic Canada congratulates the **Dalhousie University** team on winning the 2025 CFA Institute Research Challenge! Under the guidance of faculty advisor **Jun Zhou** and CFA mentor **Matthew Towns**, the team impressed with their research and presentation, earning the chance to Represent our region at the national level.

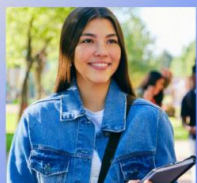


We sincerely thank our volunteer judges: **Emerson Savage, Mary Crowe, Tim Bradshaw, Brad Rowe, Stefan Cowell, and Albert Suo**, as well as **Kyle Weeden** from the CFA Society board for their invaluable support.

Congratulations again to the Dalhousie team and all participating Universities from Atlantic Canada—we are proud to support the next generation of finance professionals!



CIBC ASSET MANAGEMENT CFA SCHOLARSHIP FOR INDIGENOUS PEOPLES



Eligibility criteria

- Identify as First Nations, Métis or Inuit
- Be a citizen or permanent resident of Canada and legally eligible to work in Canada
- Willingness to work towards the CFA designation (Level I, II or III)

Financial assistance will include:

- CFA registration fee
- Exam fee
- Prep course fees (up to \$4,000)

Apply today to receive financial assistance towards your CFA designation

Please apply directly to: mailbox.CAM_IndigenousCFAScholarship@cibc.com
Please include a resume and cover letter with your application.



Upcoming Society Events

MFS Fixed Income Lunch and Learn

Date: 15 Apr 2025

Time: 12:00pm-1:30pm AT

Location: Marriott Harbour Front

33rd Annual Forecast Dinner

Date: 20 May 2025

Time: 5:00pm-9:00pm AT

Location: Halifax Convention Center

2025 Ethics Challenge

The CFA Society Atlantic Canada is proud to celebrate the success of the 2025 CFA Ethics Challenge!

Congratulations to the winning team from the **University of New Brunswick**, whose thoughtful Analysis and ethical reasoning set them apart.



A special thank you to our volunteer judges—**Maria Wagner, Mitchell Craig, and Daniel Lee**—for their insights and dedication, and to **Stephen Moore** from the CFA Society Atlantic Canada board for his ongoing support.

We look forward to another successful competition next year!



Society Board of Directors

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[See website for the most up-to-date event list](#)

CONTACT US

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