

SUMMER NEWSLETTER

Summer 2026

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A record night at the 34th Annual Forecast Dinner

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34TH ANNUAL FORECAST DINNER

A record night at the 34th Annual Forecast Dinner

On Tuesday, May 19, 2026, CFA Society Atlantic Canada hosted its 34th Annual Forecast Dinner at the Halifax Convention Centre. More than 350 members and guests joined us for an evening of insight, conversation, and community. We extend our sincere thanks to keynote speaker Joseph Tanious of Northern Trust Asset Management, whose global macro update gave our members a clear view of the road ahead.

A special thank you to Colin Marinelli, Ying Wu, and Jessie Zheng, whose work behind the scenes made the evening what it was.

Thank you to our sponsors for their generous support, and to our members for your continued engagement. We look forward to seeing you next year.

Congratulations to this year's honourees:



Stephen Moore,

Terry Milne Volunteer Award



Ashley Power,

Forecaster of the Year



Chad King,

My One Stock Pick

Thank you to our sponsors

PREMIER



DIAMOND



GOLD



SILVER



The reception at the Halifax Convention Centre

Message from the Board

Dear Members,

This has been a year of showing up for one another. From a frontier markets discussion in January to a candid look at private credit in July, our members filled rooms across Halifax to learn, question, and connect. That turnout is the clearest signal of a healthy society, and we do not take it for granted.

The 34th Annual Forecast Dinner was the high point. More than 350 of you joined us at the Halifax Convention Centre, where Joseph Tanious of Northern Trust Asset Management delivered a keynote worth the room. We were proud to recognize Stephen Moore, Ashley Power, and Chad King for their contributions to this community. Congratulations to all three.

We are equally proud of the work happening upstream. Students from Memorial University and Dalhousie University carried our region in the CFA Research

Challenge and the CFA Ethics Challenge this spring, guided by volunteer judges and mentors who gave their time freely. That mentorship is one of the most durable things this society does.

Thank you as well to the volunteers who represented us at university career fairs across the region, and to the sponsors whose support makes our programming possible.

Looking ahead, our fall calendar brings agriculture, real estate, artificial intelligence, and the macro outlook to the table. We hope you will join us. Get involved, bring a colleague, and tell us what you want to see from your society.

With appreciation,

The Board of Directors
CFA Society Atlantic Canada

UNIVERSITY COMPETITIONS

2026 Research Challenge



Congratulations to the team from Memorial University of Newfoundland, champions of the 2026 CFA Institute Research Challenge for Atlantic Canada.

Travis Noel, Nangyal Rehman, Angela Gathita, and Hailey Snow impressed the judges with the depth of their research and the clarity of their presentation, earning the chance to represent our region at the national level.

Our thanks to the volunteer judges and mentors who gave their time to the competition, and to every participating university across Atlantic Canada. We are proud to support the next generation of finance professionals.

UNIVERSITY COMPETITIONS

2026 Ethics Challenge



Congratulations to the team from Dalhousie University, champions of the 2026 CFA Society Atlantic Canada Ethics Challenge.

William Alexander, Jaden Ciocca, Catherine Coldwell, Samuel Singh, and Ana Karina Soloviov set themselves apart with thoughtful analysis and disciplined ethical reasoning.

A special thank you to our volunteer judges for their insights and dedication, and to Stephen Moore of the CFA Society Atlantic Canada board for his ongoing support of the competition.

We look forward to another strong field next year.



St. John's, Newfoundland and Labrador

2026 IN REVIEW

A year of programming

- Frontier Global Partners, Frontier Markets. January 28.
- CFA Research Challenge. February 21.
- CFA Ethics Challenge. February 28.
- Ninety One Asset Management. March 10.
- MFS Investment Management, Robert Almeida. April 14.
- CIBC Global Asset Management, currency management with Dr. Michael Sager. April 29.
- 34th Annual Forecast Dinner. May 19.
- Manulife, Public Equity: Beyond Fossil Free Strategies to Net Zero, David Ung. June 17.
- Annual General Meeting. June 25.
- Ares, Debunking the Headlines: The State of Private Credit, Ryan Brauns. July 8.



2026 CHARTERHOLDERS

Congratulations to our newest charterholders

To every member of CFA Society Atlantic Canada who earned the CFA charter this year, congratulations. It is a demanding road, and finishing it says something about you.

You join a community of investment professionals across Atlantic Canada committed to the highest standards of ethics, rigour, and service to clients. We are glad to have you with us, and we look forward to seeing you at an upcoming event.

MEMBER OPPORTUNITY

CIBC Asset Management CFA Scholarship for Indigenous Peoples

The CIBC Asset Management CFA Scholarship for Indigenous Peoples helps Indigenous candidates pursue the CFA charter. We encourage eligible members and prospective candidates to learn more and apply.

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.

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



Fredericton, New Brunswick



VOLUNTEER SPOTLIGHT

Jon MacLanders, CFA

Secretary
CFA Society Atlantic Canada

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I chose to volunteer on the CFA Atlantic board as a way to give back to a community that has had a profound impact on my career. Earning the CFA charter opened the door for me to enter the investment industry and gave me the confidence to grow. Serving on the board feels like a meaningful way to contribute to the society that helped shape my career.



VOLUNTEER SPOTLIGHT

Charlotte Liang, CFA

Financial Analyst (FP&A), Irving Oil
Director, University Relations, CFA Society Atlantic Canada

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Volunteering with the CFA Society allows me to give back to the profession and support students who are exploring careers in finance. It's been especially rewarding to help them understand the value of the CFA designation and the broader investment community.

LOOKING AHEAD

Upcoming Society Events

Fiera Capital, Agriculture
August 2026

Desjardins, Real Estate
September 2026

Mawer, Artificial Intelligence with the Chief Technology Officer
October 2026

Amundi, Macro Update
November 2026

Intech, Systematic Investing
March 2027

MFS Investment Management
April 2027

Pinnacle
June 2027

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

Society Board of Directors

Ying Wu, President

Colin Marinelli, Vice President and Director, University Relations

Jon MacLanders, Secretary

Jyoty Dev Nath, Treasurer

Patrick Davis, Director, Marketing and Social Media

Joseph DeCoste, Director, Programming and Financial Literacy

Mark Fraser, Director, Research Challenge

Alex Rowding, Director, Corporate Outreach

Alex Longmire, Director, Corporate Outreach

Stephen Moore, Director, Ethics Challenge

Charlotte Liang, Director, University Relations

Ryan English, Director, Programming

John Donaldson, Director, Financial Literacy and Advocacy

