

Canada

Candidate: Odrée Ducharme



Nomination Packet, PCR, Canada

Statement of Qualifications and Intention

I am seeking reelection for a second and final term as PCR for Canada, building on the work carried out since September 2024.

From the outset, I have exercised the PCR role from a panCanadian perspective, facilitating structured and constructive dialogue primarily between Canadian societies and the CFA Institute. **My focus has been to ensure that societies' perspectives are accurately conveyed** and well understood at the Presidents Council and senior management levels.

A central component of my mandate has been leading the national reflection on the potential **consolidation** of Canadian societies, with the objective of increasing long-term value for members. I **committed to bringing this work to completion at the level where I could add the most value**: framing the issue, structuring the analysis, securing professional support to develop a robust consolidation framework, and enabling societies to assess the opportunity within their own context and fiduciary responsibilities. This work has reached the stage where societies are positioned to make informed decisions. **While outcomes may differ, the process itself has been conducted rigorously, neutrally, and with full respect for societies' autonomy.**



Beyond consolidation, I have **actively facilitated discussions between Canadian societies and CFA Institute** on governance considerations, funding models, society sustainability, B2B initiatives, university engagement, and new membership classes. My contribution has been to translate society feedback into pragmatic and actionable dialogue.

My effectiveness as PCR is supported by **strong, trustbased relationships** with society leaders, the Presidents Council Chair, fellow PCRs, and leadership at the CFA Institute. **These relationships have enabled authentic discussions and tangible progress on sensitive files.** I have also leveraged them to seize opportunities—for example, by **facilitating** unprecedented participation by Canadian societies in U.S. subregional conferences and strengthening crossborder collaboration.

I bring extensive leadership experience within the CFA ecosystem, including service as President of CFA Montréal (2021–2023) and longstanding board involvement at the society and national levels. Professionally, I have spent close to two decades at La Caisse across asset classes and in progressively senior roles, complemented by external board leadership as Chair of the Quebec Emerging Managers Program. I am also ViceChair of the Brazilian JiuJitsu Federation of Quebec, where I support the sport’s expansion across the province by strengthening board governance.

My intention to serve a second term is grounded in continuity, credibility, and stewardship, to continue supporting Canadian societies in partnership with CFA Institute.

Odrée Ducharme, CFA
PCR, Canada

Vision for PCR Term

My vision for a second term as Presidents Council Representative for Canada is centered on **stewardship, continuity, and impact at a time of transition for CFA Institute.**

As CFA Institute enters a new leadership phase, Canadian societies have an important perspective to contribute. **My objective is to ensure that this perspective is clearly articulated, thoughtfully shared, and constructively integrated** into broader discussions at the Presidents Council and Institute leadership levels. I intend to remain at the forefront of these exchanges, leveraging the trustbased relationships I have built with society leaders, fellow PCRs, the Presidents Council Chair, the CFA Institute Board Chair, and senior management.

Equally important, I see my role as an ongoing listening post for Canadian societies. Their priorities, constraints, and opportunities continue to evolve, and I am committed to gathering their views continuously so that feedback remains relevant, grounded, and actionable. **This approach allows me not only to relay perspectives, but**



also to identify emerging opportunities where societies can derive greater value from Institute initiatives.

Building on the work of the past two years, **I will continue advancing discussions across key pillars, including governance, funding models, society sustainability, B2B initiatives, university engagement, and intersociety collaboration.**

Ultimately, **my vision is to serve as a credible, engaged, and forwardlooking PCR**, one who contributes to shaping outcomes, strengthens the partnership between Canadian societies and CFA Institute, and helps ensure that decisions made during this period of transition create lasting value for members.

Odrée Ducharme
PCR, Canada

Letter of Reference

We strongly support the reappointment of **Odrée Ducharme, CFA**, as **Presidents Council Representative for Canada** for the two-year term commencing September 1, 2026.

Since assuming the role of PCR for Canada in 2024, Odrée has executed her responsibilities with diligence and professionalism. She has served as a trusted liaison between Canadian societies and the CFA Institute Board of Governors, ensuring that Canadian perspectives are clearly represented while facilitating effective communication across the network. In her **strategic advisory capacity**, she has contributed valuable insights to CFA Institute leadership while encouraging meaningful dialogue among Canadian society presidents on issues shaping the profession and industry.

In her capacity as Presidents Council Representative, Odrée has contributed meaningfully to the governance and strategic direction of the CFA Institute. One notable example is her commitment to advancing a forward-looking vision for the evolution of the Canadian society model. Working alongside a group of past presidents and Canadian society leaders, with the support of CFA Institute, she has played an active role in a collaborative effort exploring how a regional operating model could strengthen the network across the country. This initiative reflects a shared recognition that greater coordination could improve operational efficiency, reduce administrative overhead, reinvest resources into programming and member services, and deliver a more consistent experience for members nationwide. Throughout this process, Odrée consistently advocated for a pragmatic objective: developing a structure that enables societies of all sizes to operate sustainably while delivering greater long-term value to members.

The way she has embraced her role as Presidents Council Representative reflects the same leadership she had demonstrated at the helm of CFA Montréal. We have had the privilege of



benefiting from her expertise and insight as she has continuously led with conviction and with a deep commitment to the values and ethics embodied in the CFA Charter. Her dedication to the profession and to the CFA community is both authentic and unwavering. She has long fostered strong engagement among board members while valuing the contributions of volunteers and staff. Throughout her presidency and ongoing leadership within the global CFA community, Odrée has left a lasting legacy by championing stronger governance, advancing diversity within the profession, and further professionalizing CFA Montréal—contributions that continue to influence the Society’s growth and evolution.

For all these reasons, we offer our strongest recommendation for Odrée Ducharme, CFA, to continue serving as Presidents Council Representative for Canada for the upcoming term. We are confident that her leadership, integrity and commitment to the CFA community will continue to make her an outstanding contributor to the Presidents Council and to the global CFA Institute network.

Respectfully,

Julie-Andrée Côté, CFA
President, CFA Montreal

Nominator

Nomination submitted by Amar Bajwa, P.Eng, MBA, CFA