



15th Annual
CFA Society Victoria

Forecast Dinner

January 25, 2024 | Fairmont Empress



**CFA Society
Victoria**



Complex investment and financial management needs can't be met through standard solutions. Our clients believe in the promise of something greater. So whatever your greater, Northern Trust can help you achieve it. **ACHIEVE GREATER**

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Evening program

CFA Society Victoria's [Board of Directors](#) welcomes you to our 15th Annual Forecast Dinner. Our anticipated event schedule for the evening's presentations is provided below. While we will do our best to keep to this schedule, please note that all times are approximate.

5:00 pm Cocktail reception

6:00 pm Welcome remarks

6:20 pm Dinner service

7:00 pm Panel discussions with our Forecasters

8:40 pm 2023 Forecaster Awards

8:50 pm Closing remarks

9:00 pm After event social - Q at the Empress

Please click the QR code to participate in the Q&A portion of the panel discussion.



CFA Society Victoria promotes diversity, enhances financial knowledge, and upholds the highest ethical standards.

Visit our website to learn about joining our membership.



Forecasters



Carl Tannenbaum

Chief Economist
Northern Trust

Carl Tannenbaum is the Chief Economist for Northern Trust. In this role, he briefs clients and colleagues on the economy and business conditions, prepares the bank's official economic outlook and participates in forecast surveys. He is a member of Northern Trust's investment policy committee... [Read more](#)



Douglas Porter, CFA

Chief Economist and Managing Director
BMO Financial Group

Douglas Porter has over 30 years of experience analyzing global economies and financial markets. As Chief Economist at BMO Financial Group and author of the popular Talking Points, he oversees the macroeconomic and financial market forecasts and co-writes the firm's weekly flagship publication, Focus. [Read more](#)



Lukas Smart

Managing Director
BlackRock

Lukas Smart, Managing Director, is the Head of U.S. iShares Sustainable and Factor Strategies. His cross-functional teams are responsible for factor and sustainable distribution strategy, product innovation, thought leadership, and supporting client engagement for both institutional and wealth investors. [Read more](#)

Moderator



Christopher Lawless

Chris is past-president and member of the board of directors of the Art Gallery of Greater Victoria, a member of the AGGV Foundation board, the Victoria Hospice Society board and chair of the Board of Cemetery Trustees of Greater Victoria. Chris is member of the boards of directors of the Canadian Association for Business Economics and the Association of Professional Economists of BC, and a member of the advisory board of the Border Policy Research Institute at Western Washington University. [Read more](#)

Emcee



Chelsea Kittleson, CFA

Executive Director
Municipal Pension Plan

Chelsea Kittleson is the Executive Director of British Columbia's Municipal Pension Plan (MPP), where she provides strategic advice to the Municipal Pension Board of Trustees. With 25 years of finance, capital markets and public sector pension industry experience, Chelsea has a deep understanding of the complexities of managing a defined benefit, multi-employer pension plan.

Prior to joining MPP, Chelsea was a Director, Client Relations at British Columbia Investment Management Corporation (BCI), one of Canada's largest institutional investors managing more than \$211 billion on behalf of British Columbia's public sector. [Read more](#)

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You can hire people with an MBA, but you don't necessarily know that one MBA is the same as another MBA, whereas if you hire investment professionals with a CFA [designation], you absolutely have confidence at the level of qualification."

**—Jenny Johnson, Franklin Templeton,
President and CEO**

THE VALUE OF THE CHARTER

POWERFUL GLOBAL NETWORK
of top industry professionals

STRONG FOUNDATION AND COMMITMENT
to ethics and professionalism

REAL-WORLD SKILLS for making complex investment decisions

RECOGNIZED AND WELCOMED by markets and employers globally

UNMATCHED EXPERTISE in both practical investment analysis and management skills

ACCESS to career-advancing tools and education

TOP FIVE GLOBAL CHARTERHOLDER ROLES

JOB TITLES

- 1) Portfolio Manager
- 2) Research Analyst
- 3) Chief Level Executive
- 4) Consultant
- 5) Risk Manager

PRACTICE TYPES

- 1) Equities
- 2) Fixed Income
- 3) Private Wealth and Private Markets
- 4) Derivatives
- 5) Real Estate