

CFA Society
Vancouver

FY25 Annual Report

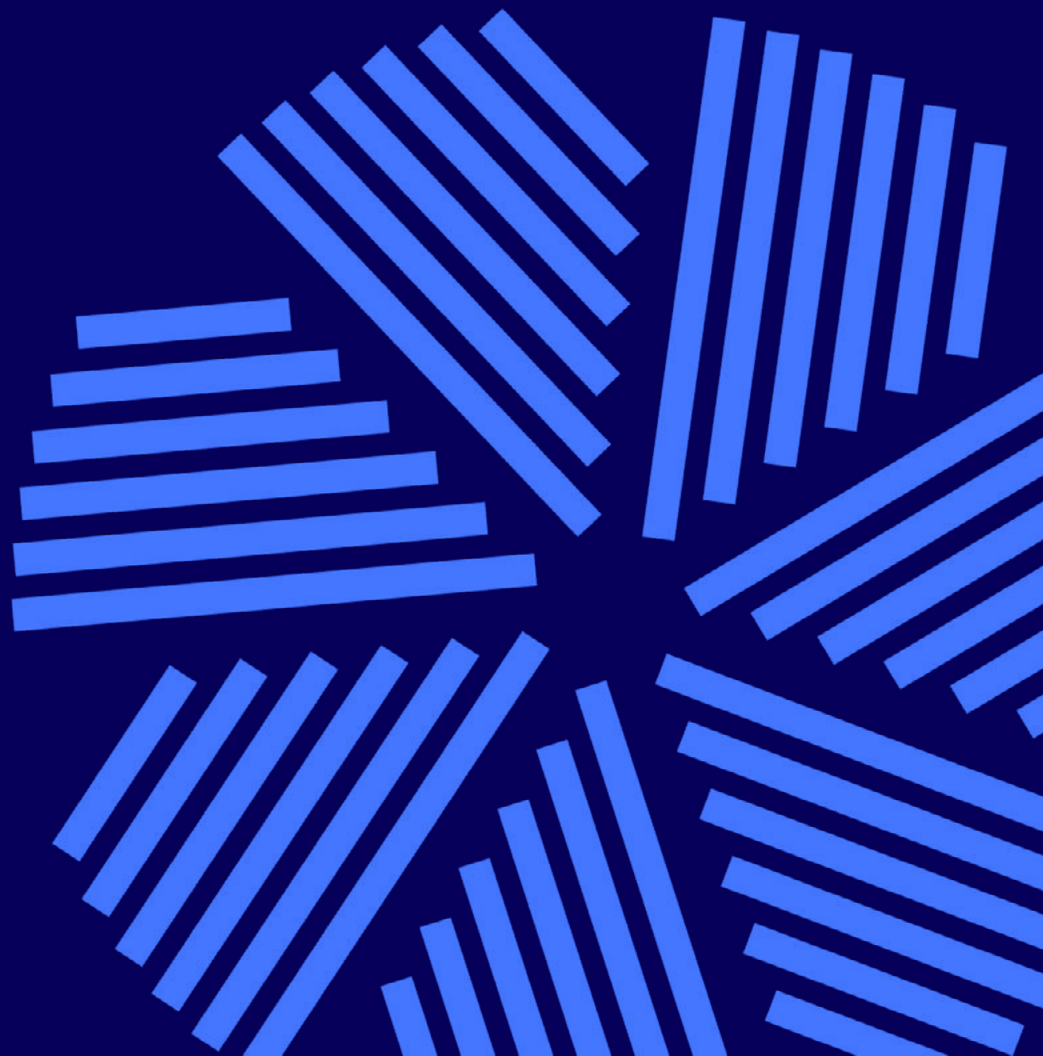




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Vancouver**

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President's Message



Salman Ahmed, CFA
President

Dear Members,

As we conclude an eventful year at CFA Society Vancouver, I want to thank you all for making our Society among the most engaged organizations within the CFA Institute orbit.

This year we celebrated our 60th anniversary annual dinner with over 900 participants in attendance. The event brought in new perspectives from Marc Lipschultz, CEO of Blue Owl. It also brought back old traditions like the bun toss.

Our Society continues to innovate to help achieve our mission. We held our inaugural University Career Fair in May with presentations by Isabel Lee, McNeill Nakamoto Recruitment Group and Rob Langrick, CFA, CFA Institute. Financial Literacy Committee collaborated with the BC Securities Commission to host a fraud awareness presentation at the Vancouver Public Library in support of fraud awareness month. And we organized a webinar with CPHR BC to provide valuable information to HR professionals, create awareness of CFA Society Vancouver and CFA Institute's research.

Some other enhancements are happening behind the scenes. Our board has undertaken projects to enhance how the Society's technology, cash management and the board structure help us becoming future-ready. We will have more to share about this as we make decisions.

This will be my last letter to you as President of CFA Society Vancouver. I've had the pleasure of working with remarkable volunteers and staff during my tenure. Thank you for giving this organization so much of your energy. There are four I would like to thank in particular. Virginia Coles and Suzanne Martin are the heartbeat of this organization. The success of our Society is a reflection of the work they put in. Nick Karliychuk brought me on as a volunteer 10 years ago to organize professional development events and later convinced me to join the board. I learned to embrace diverse perspectives by watching how he built teams. Elvis Picardo has been part of this organization for over two decades. He has an amazing knack for bringing every conversation back to first principles.

Kindly,

A handwritten signature in blue ink, appearing to be 'SA' with a stylized flourish.

Salman Ahmed, CFA
President, CFA Society Vancouver



Our Leaders

Officers



Salman Ahmed, CFA

President

Chief Investment Officer & Portfolio Manager,
Steadyhand



Karim Allibhai, CFA

Vice President

Portfolio Manager,
Odlum Brown Limited



Bryce Anderson, CFA

Secretary

Vice President of Investments,
RE Royalties Ltd.



Jessica Yang, CFA

Treasurer

Controller,
TELUS Communications



Elvis Picardo, CFA

Past President

Senior Portfolio Manager & Partner,
Luft Financial, iA Private Wealth



Our Leaders

Directors



Cindy Hu, CFA

Director

Associate Portfolio Manager,
RBC Dominion Securities



Neville Joanes, CFA

Director

Consultant,
North Star Consultants



Estelle L'Heureux, CFA

Director

Consultant,
Tyche Consulting & Inverite Insights Inc.



Karoline Luedemann, CFA

Director

Associate Portfolio Manager and Chief Compliance Officer,
Peterson Advisors Corp.



Lucy Schilling

Director

Vice Office Managing Partner,
Cozen O'Connor, LLP



Our Leaders



Sahar Sharafzadeh, CFA

Director

Manager, Pension Investment, Treasury and Financial Risk,
Teck Resources Limited



Tracy Tidy, CFA

Director

Equity Analyst,
PenderFund Capital Management Ltd.



Jenny Yu, CFA

Director

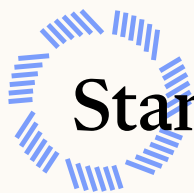
Associate Portfolio Manager,
British Columbia Investment Management Corp.



Molly Zhao, CFA

Director

Vice President, Investment Banking,
Raymond James, Ltd.



Standing Committees

Finance Committee

Duties: Support Treasurer on an as-required basis; gain experience in Society's finances; review process and procedures for cash management, foreign exchange and budgeting.

Members: Cindy Hu, Karoline Ludemann, Karim Allibhai **Executive:** Jessica Yang

Accomplishments

- Analyzed cash spending, studied last 6-years financial statements
- Assessed not-for-profit status, best practices, and risk mitigation Created Reserve Funds proposal for the board
- Reserve Funds Policy was approved and adopted by the board in May 2025
- Implemented 5-year budget plan
- Prepared background information for the April 2025 Strategic Session

Investment Committee

Duties: Review quarterly statements of investments; ensure adherence to Society's Investment Policy Statement; rebalance portfolio (with Board approval), identify new investments.

Directors: Sahar Sharafzadeh; Molly Zhao **Executive:** Jessica Yang

Accomplishments

- Reviewed and provided feedback to Finance Committee on Reserve Funds Policy
- Proposed to merge the Michael Ryan Fund with the General Fund, this was approved by the board
- Provided direction on annual decision on receiving CFAI funds currency (USD in 2025)

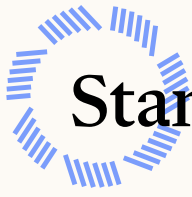
Governance Committee

Duties: Promote best practices in governance; review and maintain bylaws and policies.

Directors: Lucy Schilling, Jenny Yu **Executive:** Bryce Anderson

Accomplishments

- Updated the volunteer agreement to reflect current expectations and responsibilities
- Enhanced the nominations process by incorporating additional reference checks
- Developed a centralized policy tracker to organize the Society's policies and procedures
- Reviewed governance best practices from peer CFA societies and recommended improvements to the board



Standing Committees

Risk Management Committee

Duties: Identify and assess key organizational risks; develop and implement effective risk mitigation strategies.

Directors: Elvis Picardo, Estelle L'Heureux, Neville Joanes **Executive:** Bryce Anderson

Accomplishments

- Completed the Society's annual risk assessment
- Initiated an independent review of the Society's technology infrastructure
- Developed an implementation roadmap for Office 365 integration across the Society
- Clarified director responsibilities regarding committee oversight
- Rebalanced investments



Vision Statement

To serve CFA charterholders and candidates in Greater Vancouver by providing investment related programming and professional development, and to increase the awareness of the CFA designation with the investing public and employers. Further, to be the voice of the CFA charterholder and candidate in the areas of ethics and excellence of practice.



Mission Statement

To lead the investment profession in the Greater Vancouver area by promoting the highest standards of ethics, professional development, and professional excellence for the ultimate benefit of society.



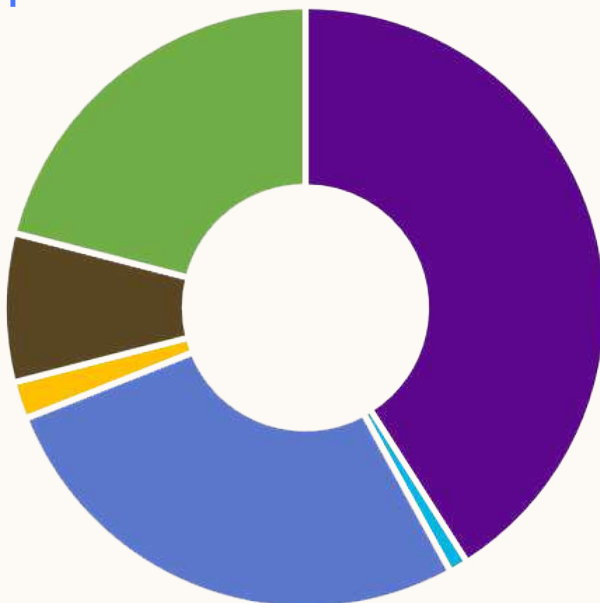
Financial Breakdown

Revenue

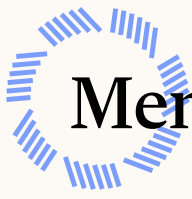


- Annual Dinner 18%
- CFA Institute Funding 12%
- Job Postings 2%
- Membership Dues 29%
- Program & Events 7%
- Sponsorship 23%
- Income Distribution/Unrealized Gain 9%

Expenses



- Operations/G&A 41%
- Advertising Campaign 1%
- Annual Dinner 27%
- CFA Societies Canada 2%
- Outreach Initiatives 8%
- Programs & Events 21%



Member Services

In 2025, CFA Society Vancouver proudly celebrated its 60th anniversary. To commemorate this milestone, the organization hosted its annual dinner, featuring welcome remarks from CFA Institute CEO & President Margaret Franklin, CFA, followed by a special panel of past presidents who shared reflections and memorable moments from the past six decades.

The Society remains committed to delivering exceptional member services, supporting CFA charterholders at every stage of their careers. This year, the Society hosted a focus group with members across the early, mid, late, and retired career stages to better understand the evolving needs of its diverse membership. These insights will help shape future programming and resources.

Professional development and career advancement remained a key focus in 2025. The Society delivered a wide array of learning opportunities, including workshops on Python, Powerfully Negotiating Your Value, and Advocating for Yourself at Work. The Programs Committee welcomed esteemed guests such as Professor Meir Statman, hosted an expert panel on energy, and facilitated webinars on emerging subjects like Generative AI.

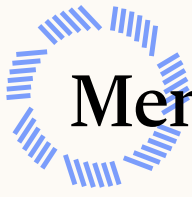
The Mentorship Program paired 19 mentors and mentees this year, continuing its important role in guiding members through their career journeys. The program offers mentees invaluable access to seasoned professionals who provide guidance on career planning, industry insights, technical skills, and soft skill development. For mentors, the program is an opportunity to give back to the CFA community, refine their leadership and coaching skills, and gain fresh perspectives from the next generation of finance professionals.

Networking and collaboration were equally strong pillars in 2025. CFA Society Vancouver continued its partnerships with organizations such as CPA, CBA BC, CAIA, AIMA, CBV, and fellow CFA Societies in Calgary and Ottawa. These collaborations expanded members' professional networks and provided opportunities to engage with individuals from a variety of financial designations.

Signature events further enriched the member experience. CFA Day featured keynote speaker Shane Parrish, moderated by Michael Wallberg, CFA. We were honored to present the Michael Ryan Award of Excellence to Ileen Peng, CFA, recognizing her outstanding contributions to the investment industry.

The 22nd Annual Charter Awards Ceremony was a highlight of the year, celebrating the achievements of 48 new charterholders from the 2024 cohort. Held at The Vancouver Club, the evening featured an elegant white-glove dinner service and a timeless ambiance that honored both tradition and accomplishment.

More than just a formal recognition, the Charter Awards Ceremony serves as a meaningful introduction to the CFA Society Vancouver community. New charterholders have the opportunity to connect with peers, Society leadership, and senior professionals, helping to foster long-term relationships and build lasting professional networks. The event marks not only the culmination of years of dedication and rigorous study but also the beginning of a lifelong connection to a global community committed to the highest standards in the investment profession.

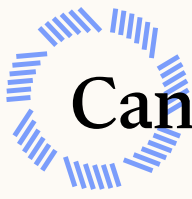


Member Services

Our vibrant calendar of social events continued to build community among members. Highlights included the popular Monte Carlo Night, co-hosted with CPA and CBA BC, offering a festive evening of casino games, networking, and prizes. The Women's Lunch and Connect returned for a second successful year, and we launched the Ugly Sweater Christmas Cruise, which brought holiday cheer to the waterfront. The new WhatsApp Meetups have created accessible, informal opportunities

for members across stages, ages, and locations to connect. We also hosted a family-friendly event at the Carousel Theatre, supporting members with young children.

CFA Society Vancouver is proud to reflect on a year of growth, connection, and continued service to its members. As we celebrate 60 years of excellence, we look forward to building an even stronger future together.



Candidate Support

CFA Society Vancouver's candidate support strategy in 2025 focused on three key areas: Exam Support, Career Development, and Community Building. These efforts reflect the Society's ongoing commitment to helping candidates succeed throughout the CFA Program and prepare for their future as charterholders.

Exam Support

Preparing for the CFA exam is a critical step in the candidate journey and foundational to the strength of our future membership. In 2025, CFA Society Vancouver hosted four well-attended Level I and II workshops led by UBC professor and long-standing Society member, Darren Degraaf. These sessions covered key curriculum topics, including Financial Statement Analysis and Fixed Income, and provided candidates with practical insights and strategies.

To further support exam readiness, the Society organized dedicated roundtable discussions for Level I and Level III candidates. These sessions were designed to help participants better understand the structure, expectations, and procedures of the computer-based exam format, ensuring they felt confident and well-prepared on exam day.

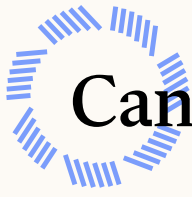
Recognizing the mental and emotional demands of the CFA exam process, the Society once again hosted its annual Keep Calm & Study On webinar. Co-led by psychologist Dr. Christine Korol and Darren Degraaf, this event provided candidates with proven stress-management techniques and guidance on developing a sustainable, effective study plan.

Career Development

Supporting candidates' professional growth beyond the exam is also a key priority. The popular Career Roundtable event featured expert presentations from Isabel Lee of McNeill Nakamoto Recruitment Group and Kaushal Parikh of Leith Wheeler Investment Counsel. Together, they offered valuable advice on crafting compelling résumés and cover letters, mastering interview techniques, and making lasting professional impressions. In addition, a number of CFA charterholders participated in the roundtable discussions, offering candidates the opportunity to hear personal career journeys, ask questions, and form meaningful connections. This personal interaction helped bridge the gap between exam preparation and real-world application, allowing candidates to envision their future roles within the profession.

To build on this momentum, the Society launched its inaugural Coffee Chat webinar, where candidates learned how to conduct successful informational interviews with charterholders—an essential skill for building meaningful career connections.

The Day in the Life webinar series gave candidates direct access to charterholders working across various roles and industries. CFA charterholders shared candid insights into their daily responsibilities and discussed how earning the CFA charter helped shape their career paths. Isabel Lee also led a follow-up webinar focused specifically on résumé and cover letter critiques, providing personalized feedback to help candidates present themselves with confidence and professionalism in the job market.



Candidate Support

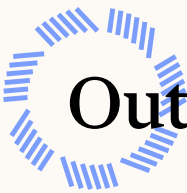
Community Building

The Society believes that today's candidates are tomorrow's colleagues, collaborators, and leaders. With this in mind, CFA Society Vancouver hosted a series of social events to foster early relationship-building and camaraderie. Highlights included the Candidate Classic at Ambleside Pitch and Putt, the lively Meet Your Peers pub night, and a festive Year-End Celebration at Mahony's Tavern. These gatherings offered a relaxed environment

for candidates to connect, share experiences, and build friendships that will extend throughout their careers.

Through a comprehensive approach to exam preparation, career advancement, and community engagement, CFA Society Vancouver continues to support candidates not only as they progress through the CFA Program but also as they begin shaping their professional futures.





Outreach Initiatives

In 2025, CFA Society Vancouver continued to raise awareness of the organization and the value of the CFA designation through a range of strategic initiatives aimed at diverse stakeholder groups, including employers, regulators, students, and the broader investment community.

In collaboration with CFA Institute and CPHR BC, the Society co-hosted a webinar featuring Ryan Munson from CFA Institute. The session explored the Institute's Future of Work research, using the investment industry as a case study to demonstrate how these insights can be applied across other sectors. The webinar attracted attendees from universities, non-profits, and government organizations, highlighting the cross-industry relevance of the findings. As a result of this successful initiative, CFA Society Vancouver was invited to present its work at CFA Institute's 2024 Society Leadership Conference.

In recognition of Fraud Awareness Month, the Society partnered with the BC Securities Commission (BCSC) to co-present an in-person session at the Vancouver Public Library, promoting investor protection and fraud prevention. In support of this initiative, the Society developed a dedicated, evergreen webpage to showcase BCSC resources and amplified their messaging across LinkedIn and the BC Investment Outreach Newsletter, ensuring that members remained informed about evolving regulatory developments.

The Society was also proud to collaborate with CFA Institute on a webinar series tailored for Canadian pension trustees, organized through Unifor. Workshops were led by Janine Guenther, CFA, and Darren Degraaf, CFA, covering topics such as Investment Governance and Fiduciary Duty and Basic Investment Trustee Education—critical components for those entrusted with managing pension assets.

To promote CFA Institute's Certificate in ESG Investing, the Society hosted a panel discussion where charterholders shared their personal experiences, offering insights into the value and career impact of earning the certificate.

On the academic front, the University Outreach team engaged with students from UBC, Capilano University, Trinity Western University, BCIT, Kwantlen Polytechnic University, and UCW. At UCW alone, over 150 students attended the presentation, demonstrating strong interest in the CFA Program. Using materials developed by CFA Institute and videos featuring local charterholders, volunteers delivered cohesive and compelling sessions on the value of pursuing the CFA charter. The team also joined a joint panel with CPA professionals, highlighting the complementary benefits of earning both designations.

Through the CFA Institute Research Challenge and the Canadian Ethics Challenge, the Society's University Outreach Case Competitions team worked closely with local universities to support student teams in high-level competitions. This year, participants analyzed Air Canada as their subject company for the Research Challenge, while Ethics Challenge teams tackled a real-world ethical scenario, presenting their findings to a panel of industry judges.

CFA Society Vancouver recognizes that meaningful outreach requires multi-channel engagement across audiences. Whether through professional webinars, regulatory partnerships, student engagement, or public awareness efforts, the Society remains committed to promoting the CFA charter and demonstrating the value of hiring CFA charterholders across industries.



Committee Volunteers

Awareness

Chair Daman Minhas, CFA
Amin Behrad
Mark Bodnar, CFA
Sakib Noor, CFA
Chris Santa Cruz
Rachel Simister, CFA
Adam Velji, CFA

Candidates

Co-Chair Falaq Hamirani, CFA
Co-Chair Anthony Lao, CFA
Mark Li
Michal Prielcel
Keaton Wong, CFA
Eric Zhou

Financial Literacy

Co-Chair Roland Goh, CFA
Co-Chair Adele Liu, CFA
Jon Potter, CFA
Jessica Kong, CFA
Steve Sun, CFA
Beau White, CFA
David Xiao, CFA

Mentorship

Chair Trevor Lee, CFA
Joanne Carnell, CFA
Sasha Evans, CFA
Marc-Antoine Rouleau, CFA
Rachit Tibrewala, CFA
Wendy Vu, CFA
Sally Ye, CFA
Leo Zhang, CFA

Programs

Chair William Sapphire, CFA
Naheed Gilani, CFA
Michael Keyrouz, CFA
James Liu, CFA
James Manning, CFA
Rachel Ni, CFA
Amar Pandya, CFA
Dean Shepard, CFA

Social

Chair Craig Withers, CFA
Tina Chen, CFA
Darrin De Stephanis, CFA
Leona Ji, CFA
Troy Peart, CFA
Bethany Terracina
Ignacio Torrillo, CFA

University Outreach

Co-Chair Parveen Walia, CFA
Milton Lu, CFA
Michael Mak, CFA
Jason Quan, CFA
Yoel Tewelde
Thilina Ukwatta, CFA

University Outreach – Case Competitions

Co-Chair Nick Lum, CFA
Emily Chang, CFA
Korak Ghaffour, CFA
Liam McAlea
Novar Qin



CFA Institute Research Challenge Volunteers

Competition Mentors

Oliver Bailey, CFA
Chris Martino, CFA
Glenn Rogers, CFA

Competition Graders

Tim Abdelkhalek, CFA
Alicia Armstrong, CFA
Jamie Kozak, CFA
Vanessa Wittel, CFA

Competition Judges

Geoff Castle, CFA
Mahad Farrukh, CFA
Cindy Hu, CFA
Nicholas Van Dyk, CFA

Mentorship Program

Mentors

Karim Allibhai, CFA
Scot Atkinson, CFA
Nick Biln, CFA
Jessie Bobinski, CFA
Pooja Gurralla, CFA
Jon Li, CFA
Shea McEachrane-Johnson, CFA
Mary Lou Miles, CFA
Rachel Ni, CFA
Sakib Noor, CFA
Lars Raynard, CFA
Cheryl Sauve, CFA
Colin Sinclair, FA
Paul Stefansson, CFA
Liam Voykin, CFA
Mike Wallberg, CFA
Kevin Wong, CFA
Albert Wong, CFA

CFA Societies Canada Ethics Challenge

Competition Judges

Ian Robertson, CFA
Gordon Ross, CFA
Michael Wallberg, CFA



2024 New Charterholders

Navdeep Bains, CFA
Benny Bajaj, CFA
Gregory Jean Barbier, CFA
Carson William Batt, CFA
Gregory Adam Battis, CFA
Alexander Wolfe Belkin, CFA
Harry Bering, CFA
Dhruv Bhagat, CFA
Menno Burnet, CFA
Cyndora Si Yu Chan, CFA
Li Fei Chen, CFA
Nuo Chen, CFA
Qi Chen, CFA
Weijian Chen, CFA
Shivani Chitroda, CFA
Daniel Christopher Chu, CFA
Amauri Esposte Coelho, CFA
Jared Matthew Craig, CFA
Kim Alyssa Angeles David, CFA
Carl Brian Davies, CFA
Arenddeep Singh Dhadwal, CFA
Jevin Shawn Dusanj, CFA
Edward Thomas Freeman, CFA
Chengbo Fu, CFA
Michael George, CFA
Apostolos Georgeopoulos, CFA
Bita Moradi Ghahderijani, CFA
Catherine Fiona Gibbons, CFA
Julian Akira Goto, CFA
Michael James Grimes, CFA
Qizheng Guan, CFA
Yilin Guan, CFA
Ming Guo, CFA
Song Han, CFA
Avinash Mukesh Haswani, CFA
Haitham Andrawes Hejazin, CFA
Jordan William Hiebert, CFA
Arthur Way Seng Ho, CFA
Jake Charles Holland, CFA
Jesse Hooton, CFA
Aaron Huang, CFA
Lujun Huang, CFA

Telis Huang, CFA
Jeremy Frank Jersic, CFA
Xiaoyuan Ji, CFA
Shan Jiang, CFA
Xintong Jiang, CFA
Richard Paul Johansen, CFA
Jeffrey David Douglas Jones, CFA
Helen Livia Junata, CFA
Chia Hsin Kan, CFA
Aeron Masashi Kawakami, CFA
Sun Woo Kim, CFA
Devon Michael Nixon Krogh, CFA
Jacob Mitchell Kronick, CFA
Creighton Lau, CFA
Vincent Kai Kit Lee, CFA
Jonathan Brian LeLievre, CFA
Douglas G. K. Leung, CFA
Dan Li, CFA
Jingkun Li, CFA
Lingxi Li, CFA
Xuehong Li, CFA
Yiheng Lin, CFA
Yali Liu, CFA
Shengjie Lu, CFA
Jie Ma, CFA
Yuanzhe Ma, CFA
Benjamin Machel, CFA
Daniel Connor MacMaster, CFA
Alexey Manov, CFA
Ling Mao, CFA
Rui Mao, CFA
Nicholas Sean McBride, CFA
Gaurav Mishra, CFA
Tristan Van Morgan, CFA
Theodore Michael Murphy, CFA
Takudzwa Blessing Ndachena, CFA
Tat Thanh Nhan Nguyen, CFA
Thanh Dat Nguyen, CFA
Derek Oswald, CFA
Lu Pan, CFA
Jisoo Park, CFA
Calin Thomas Pastuch, CFA

Deep Nikeshbhai Patel, CFA
Amit Prasad, CFA
Rashed Quran, CFA
Muhammad Ateeb Riaz, CFA
Alexander Romanowich, CFA
Jordan Louis Ross, CFA
David Sinuhe Saldana Pardo, CFA
Jordan Frederick Sanders, CFA
Gosheele Devi Sewruttun, CFA
Reha Sharad, CFA
Sawyer Graham Smith, CFA
Nicholas Smulja, CFA
Kevin Spooner, CFA
Ksenia Dmitrievna Strigoun, CFA
Aarondeep Singh Takhar, CFA
Matthew Anderson Te, CFA
Andrii Teterskyi, CFA
Carlos Ishikawa Torres, CFA
Brayden Emery Toullelan, CFA
Evangelos Stefanos Trachalios, CFA
Daniel James Veaudry, CFA
Adam Velji, CFA
Ruipeng Wang, CFA
Yingjie Wang, CFA
Yuxuan Wang, CFA
Patrick Nicolas Wilson, CFA
Clinton Jan William Windhorst, CFA
Alex David Wong, CFA
Benjamin Gah Sing Wong, CFA
Jose Antonio Wong Hayakawa, CFA
Yi Sheng Wu, CFA
Cong Xiao, CFA
Yulong Xiao, CFA
Lujia Xu, CFA
Jing Yan, CFA
Zhou Yan, CFA
JiaRui Yao, CFA
Fabian Fernandez Zarpan, CFA
Zhi Wei Zeng, CFA
Jeffrey Jiunlin Zhang, CFA
Shukai Zhang, CFA



Sponsorship Support

Annual Corporate Sponsors

Annual Corporate sponsors support CFA Society Vancouver throughout the year over a number of committees including Programs, University, Awareness, CFA Day, and the Annual Dinner.



60th Anniversary

Sponsors support our marquee event, which features prominent keynote speakers and attracts over 1,000 members, candidates, and guests.

GOLD SPONSOR:



SILVER SPONSORS:



BRONZE SPONSORS:



Sponsorship Support

Candidate Sponsors



Master of Finance
Beijing



McNeill Nakamoto
Recruitment Group
MCNAK.COM

CFA Day Sponsors

CFA Day celebrates CFA charterholders to bring the finance community together.



NATIONAL
BANK
INDEPENDENT NETWORK



InteractiveBrokers

Mentorship Sponsor

Sponsorship enables the committee to develop mentorship resources and events for program participants.



McNeill Nakamoto
Recruitment Group
MCNAK.COM

Programs Sponsors

Professional development activities for CFA charterholders and finance professionals.



aviso
correspondent
partners



BMO Global Asset
Management



Global Asset Management
PH&N Institutional

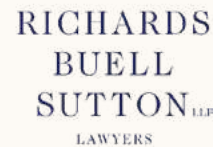


Sponsorship Support

Alternative Investment Outlook Forum Sponsors



Social Events Sponsors



University Outreach Sponsors



Event Partners



Annual Gallery

60th Anniversary

January 23, 2025



CFA Society Vancouver President,
Salman Ahmed, CFA



CFA Institute CEO & President,
Margaret Franklin, CFA



Volunteer of the Year,
Adele Liu, CFA



Volunteer of the Year,
Roland Goh, CFA

Volunteer of the Year
Adele Liu, CFA

Annual Gallery

60th Anniversary

January 23, 2025



Past President Panel:
David Smith, CFA;
Bill Wheeler, CFA;
Janine Guenther, CFA;
Al Tynan, CFA

Moderator: Andrew Sweeney, CFA
Keynote Speaker:
Marc Lipschultz, Blue Owl Capital

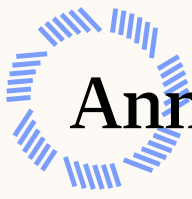


Marc Lipschultz; Michael Wallberg, CFA;
Janine Guenther, CFA; Margaret Franklin, CFA;
David Smith, CFA; Bill Wheeler, CFA



After Party at
Mahony's Tavern

Volunteer of the Year
Adele Liu, CFA



Annual Gallery

CFA DAY

June 18, 2024



2025 Recipient of the Michael Ryan Award of Excellence, Ileen Peng, CFA

Presented by Janine Guenther, CFA



Shane Parish and Michael Wallberg, CFA



Programs



Energy Transition Panel
October 29, 2024



Professor Meir Statman
November 27, 2024

Alternative Investment Outlook Forum

March 5, 2025



Hanif Mamdani – RBC Global Asset Management
Moderator Sara Mackasey, CFA – TD Securities



L to R: Ross Curry, CFA – BCI
Domenic Bellissimo, CFA – Dynamic Funds
Hugo Ovando Amaral – BlackRock
Moderator: Dasha Zuck, CFA – Mercer



L to R: Simran Parmar – CAIA Canada West
Ivy Leung, CFA – CAIA Canada West
Suzanne Martin – CFA Society Vancouver
Claire Van Wyk Allen – AIMA Canada
Michael Keyrouz, CFA – CFA Society Vancouver

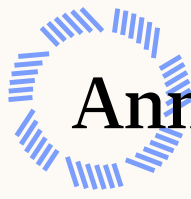


Annual Gallery

Social

2024 Monte Carlo Night
October 10, 2024





Annual Gallery

Social

Ugly Sweater Christmas Cruise
December 6, 2024



22nd Annual Charter Awards Ceremony

March 13, 2025



CFA Society Vancouver Vice President,
Karim Allibhai, CFA



Past Presidents: Nick Karliychuk, CFA; Ian Robertson, CFA;
Elvis Picardo, CFA; Janine Guenther, CFA; David Williams





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