CFA Society Vancouver

Financial Literacy Outreach

Program Overview

Financial Literacy Outreach is a program led by the CFA Society Vancouver's Financial Literacy Committee, created to empower communities through personal finance education.

We partner with non-profit organizations to co-host interactive workshops and seminars designed to give participants practical tools and knowledge to improve their financial well-being.

Our goal is simple: to make financial literacy accessible to everyone. We focus on underserved groups, including women, Indigenous communities, newcomers, and youth because we believe that greater awareness of financial concepts strengthens not only individuals, but society as a whole.

Each session is:

- Tailored to your community's needs – Topics are customized to address what matters most to your constituents.
- Led by experts – All sessions are facilitated by CFA charterholders, experienced professionals in personal finance, investment, and financial planning.
- Accessible and affordable – Events are offered online or in person, free of charge or for a nominal fee collected by the host organization.

Together, we can help your clients, stakeholders, and community members build the confidence and skills they need to make informed financial decisions.

Event Topics

Depending on the needs of participants, the topics can cover a wide range of general or focused personal finance related issues.

Examples of general topics

1. Budgeting and Goal Setting
2. Understanding Personal Banking and Borrowing
3. Getting Started on Investing
4. Building a Retirement Plan
5. Personal Debt and Student Loans

Examples of focused topics

1. Raising Children to be Financially Literate
2. Financial Planning for Women
3. Building a Good Credit Score
4. Impact of Inflation on Financial Goals
5. Finding the Right Financial Advisor

Committee Volunteers



Roland Goh, CFA

Committee Co-Chair

Roland has more than 20 years of investment experience in both global public and private markets and currently works in the personal banking division at CIBC. In his previous capacity as the Chief Investment Officer, he started the fund management business for a private conglomerate. Prior to that, he held research responsibilities across various geographical regions and asset classes in one the largest family offices based in Singapore. Roland holds a Bachelor of Accountancy from Nanyang Technological University. Other than a CFA charterholder, Roland is also a Chartered Accountant of Singapore. He is passionate about financial literacy and participates regularly in educational focused events.

Committee Volunteers



Adele Liu, CFA

Committee Co-Chair

Adele is the Regional Head, Wealth Management Credit at RBC. She leads a team of credit professionals working with high net worth clients and supporting Wealth Management Canada's international private banking business. Adele has 20+ years of experience in financial services, including international trade settlement, risk management, corporate credit, relationship management, etc. She has an MBA with Distinction from the Schulich School of Business in Toronto. Adele is an avid reader and passionate about nature conservation and animal protection. She is the Treasurer and a board member of Nature Vancouver.

Committee Volunteers



Claire Huxtable, CFA

Claire Huxtable is a senior equity analyst at ERA Forest Products Research. She began her career working for Western Forest Products on Vancouver Island before working in the U.S. as a portfolio analyst and account manager for Hancock Timber Resource Group (now Manulife), one of the world's largest timberland investment management organizations. ERA follows global forest products commodities from timber through tissue, with a focus on North America.

Committee Volunteers



Christina Ma, CFA

Christina is an Associate Portfolio Manager at RBC Phillips, Hager & North Investment Counsel, assisting her Investment Counselor with portfolio construction and day-to-day portfolio management duties. Prior to her current position, she spent two years working at RBC Dominion Securities as an Investment Advisor Associate and six years at JPMorgan Chase & Co. as an Investment Banking Operations Associate working in Singapore, HK and Shanghai. She holds a Bachelor of Arts (Hons) degree from the University of British Columbia. In addition to her CFA charter, Christina also earned the Certified Financial Planner (CFP) and Chartered Investment Manager (CIM) designations.

Committee Volunteers



Brandon Miranjie, CFA

Brandon is an Associate Consultant with Prime Quadrant. He previously worked in wealth management at CIBC Wood Gundy and Edward Jones, where he developed expertise in investment research and portfolio management. Brandon holds a Bachelor of Management and Organizational Studies with an Honours Specialization in Finance from Western University and earned his Chartered Financial Analyst (CFA) designation in 2026.

Committee Volunteers



Beau White, CFA

Beau is a Chartered Professional Accountant (CPA, CA) and a Chartered Financial Analyst (CFA) Charterholder with over 10 years of work experience in accounting, finance, and cash management. Beau is Director, Finance & Metal Sales at Royal Gold, Inc. and also serves on the Board of Directors for Morien Resources Corp. Her previous experience includes managing the cash, investments and debt balances of Sandstorm Gold Ltd. and working as an Audit and Assurance Manager for PwC Canada. She holds a Bachelor of Commerce degree in Management and a Bachelor of Science degree in Economics from the University of Victoria.

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Committee Volunteers



David Xiao, CFA

David is an Associate Investment Counsellor at RBC Phillips, Hager & North Investment Counsel. With over a decade of experience in wealth management, he delivers tailored investment management and financial planning solutions to high-net-worth families, corporations, and not-for-profit organizations. David holds an Honours Business Administration from Ivey Business School and is a CFA Charterholder. David is also deeply committed to community involvement, contributing his time and expertise to a number of charitable organizations.

Committee
Mission & Vision

MISSION

To lead CFA Society Vancouver in bringing the benefits of personal financial knowledge to the general public.

VISION

To improve the well-being of the society at large by leveraging the professional knowledge base of CFA Institute.

Professional
Affiliations

We work with organizations affiliated with CFA Institute, such as the Financial Literacy Network that brings together resources from other local CFA Societies with established financial literacy programs.

Contact Us

We welcome the opportunity to connect with your organization. If you are interested in exploring partnership opportunities or arranging a complimentary financial literacy presentation tailored to the needs of your community, please contact us. Our team will be pleased to provide further information and work with you to organize a session that supports your constituents' financial well-being.

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