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

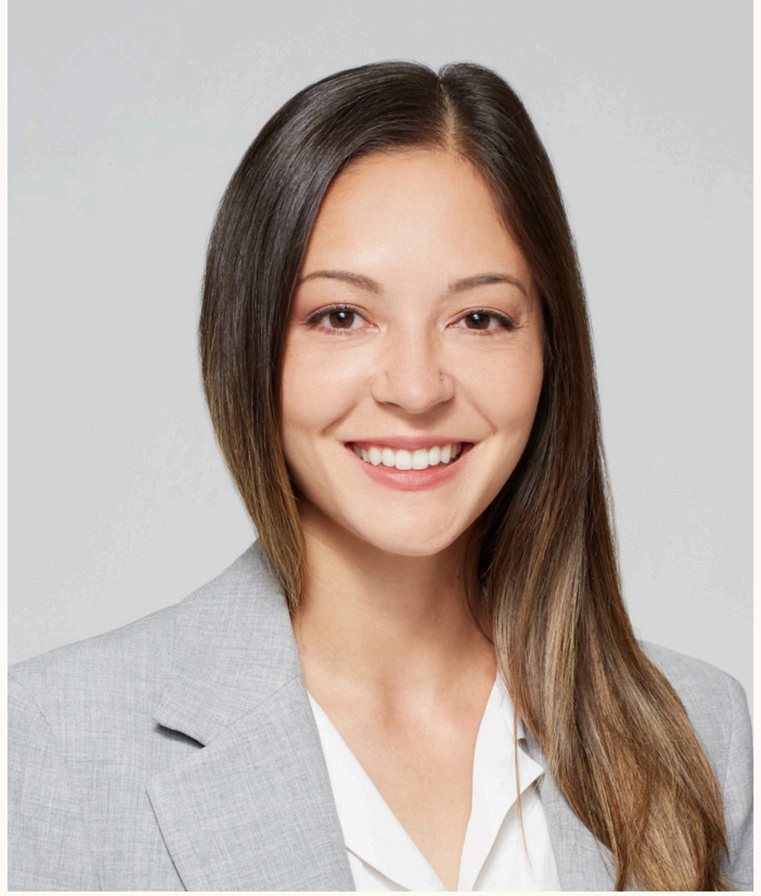
Christina is an Associate Portfolio Manager at RBC Phillips, Hager & North Investment Counsel, assisting her Investment Counselor with portfolio construction and day-to-day portfolio management duties. Prior to her current position, she spent two years working at RBC Dominion Securities as an Investment 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

Steve Sun, CFA

Steve is a Senior Portfolio Manager with BMO Private Wealth. Over the Last 27 years, Steve has developed a reputation as a highly trusted Investment Advisor in the industry. Born and raised in Shanghai China, he studied at Shanghai International Studies University before moving to North America in 1991. After completing his MBA in Finance from Simon Fraser University in 1995, he has been working with major bank owned asset management and securities firms. He has developed depth of expertise in providing personalized investment solutions for high net worth new Canadian families.

Committee Volunteers



Beau White, CFA

Beau White is a Chartered Professional Accountant (CPA, CA) and a Chartered Financial Analyst (CFA) Charterholder with over 10 years of work experience in accounting, tax and cash management. She also holds a BCom and a BSc (Economics) from the University of Victoria. Beau is the Director of Treasury and Finance for Sandstorm Gold Royalties where she manages the company's cash, investment and debt balances. She also serves on the Board of Directors for Morien Resources Corp. Previously, Ms. White was an Audit and Assurance Manager for PwC Canada and worked with a large range of clients including individuals, not-for-profit organizations, insurance companies, pension funds and a variety of multi-national, publicly-traded companies. She is passionate about behavioural finance and the psychology behind spending and investing decisions.

Committee Volunteers

David Xiao, CFA

David has 10 years of experience in financial services and is currently an Associate Advisor at RBC Wealth Management. He and his team are dedicated in providing holistic financial planning solutions for families to help them reach their financial goals. David holds an Honours Business Administration from Ivey Business School and is a CFA Charterholder since 2020. In his spare time he likes to give back to the community by volunteering for various 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.

Virginia Coles
Executive Director
CFA Society Vancouver
604-985-9889
info@cfavancouver.com
cfavancouver.com