



**CFA Society
Vancouver**

Member Handbook



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Welcome!

Thank you for being a valued member of CFA Society Vancouver! This publication is designed to give you a detailed overview of our society and the many benefits that accrue to you from your membership.

There are many ways for you to get involved. Regular communications will invite you to an array of events, from speaker presentations and career development workshops to social gatherings providing opportunities to connect with colleagues and build your professional network.

Exclusive membership features include access to our Mentorship Program, our annual Monte Carlo Night in collaboration with CPABC and CBABC, a monthly casual social “Member Meet-Up” group, reduced member pricing on all events and, for our 15+ year charterholder members, the “Beyond the Book” Book Club.

As an organization reliant on volunteer support, you have the opportunity to volunteer with one of our working committees, as a mentor in our mentorship program, a Research and Ethics Challenge judge or mentor, a Board Member or an event presenter or moderator.

Enjoy your journey through the following pages. We have a rich and vibrant community here in Vancouver and we hope you will take advantage of your membership with us!



View the FY25 Annual Report for a great summary of our activities this past year.
<https://www.cfasociety.org/vancouver/about-us/bylaws-reports>



About Us

Founded in 1965, CFA Society Vancouver (formerly The Vancouver Society of Financial Analysts), is the local member chapter of CFA Institute and one of the 12 Canadian member societies that collaborated with CFA Institute to form CFA Societies Canada.

CFA Society Vancouver is a not-for-profit organization that supports professional development and advancement of CFA charterholders, awareness of the CFA charter and offers opportunities for building professional connections and community. Our membership consists of over 2,000 regular, affiliate and associate members representing a wide range of companies.

CFA Society Vancouver is the third largest society in Canada – 17th largest society globally.

HIGHLIGHTS AND AWARDS

- Hosted the **CFA Institute Annual Conference** – 2008
- CFA Institute **Society Excellence Award** – 2013
- Pioneered a highly successful **Women's Symposium** – 2013
- CFA Institute **Society Collaboration Award** – 2015
- Recipient of three **CFA Institute Society Excellence Awards** – 2017
 1. Most Outstanding Society
 2. Volunteer of the Year – David Smith, CFA
 3. Advance Professionalism & Professional Recognition – in collaboration with the Canadian CFA Societies
- CFA Institute **Society Excellence Award** – 2018
- Hosted CFA Institute **Americas Society Leadership Conference** – 2018
- **Record attendance** of 1,190 at our **42nd Annual Forecast Dinner** – 2020
- **60 Year Anniversary** – 2025



OUR MISSION

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.

OUR VISION

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.

Your Membership Benefits

CFA Society Vancouver strives to provide exceptional local member services to current and future charterholders and investment professionals in the following three areas:

1. Continuing Professional Development
2. Community and Networking
3. Discount Programs and Special Offers

1. CONTINUING PROFESSIONAL DEVELOPMENT

EVENTS AND WORKSHOPS

Our Programs Committee coordinates over 15 events per year (a mix of both virtual and in person offerings), sourcing speakers and topics to give you a career edge, help serve the needs of your clients and firm, maintain the integrity of your CFA charter and help keep you current with industry standards and trends.

- **Special member pricing applies.** Register for events using the email address you use for your CFA Institute membership account to obtain this pricing.
- **Event specific emails** are sent to you once an event is open for registration.
- **A calendar of upcoming events** can be found on the [Society website](#) – along with registration options.

Watch out for complimentary member events and the opportunity to pre-register at Early Bird member pricing!



CAREER DEVELOPMENT

Part of CFA Society Vancouver's broader Career Development focus is to offer members a varied suite of career skills presentations and workshops each year. Topic examples include technical Gen AI workshops, leadership, negotiation, public speaking & presentations, personal branding and time management.

JOB BOARD

CFA Society Vancouver's **Job Board** can be found [on our website](#). Positions are regularly featured on our LinkedIn page and in member newsletters. **CFA Society Vancouver members are eligible to receive a 50% discount** off the standard rate for postings within their firm.

MENTORSHIP PROGRAM

The CFA Society Vancouver's **Mentorship Program** is a powerful exclusive charterholder member benefit that launched in January 2017. It is a year-long program running January to December that pairs industry-experienced mentors with entry and mid-level professionals in the investment industry.

The Program kicks off in September with an **Information Session** open to all interested Charterholder members, Charter Pending members and LIII Candidate members. Applications are accepted until mid-October and successful pairings are required to attend a "Break the Ice" program workshop early January. Support and check-ins are scheduled throughout the Program year. For more information visit the [Mentorship Program](#) page on our website.

PROFESSIONAL LEARNING (PL) PROGRAM

This voluntary CFA Institute program enables you to earn credit for participating in professional development activities that increase your industry knowledge, skills and abilities as an investment professional. Most Society presentations and workshops are PL eligible and the credit is submitted on your behalf.

"As a long time CFA Society Vancouver member, and portfolio manager working with high net worth clients, I find the offerings of options for continuing education from CFA Society Vancouver exemplary. Even if the topic isn't specifically targeted to my day to day role, it offers insight into the industry and increased knowledge of capital markets and the economy. The added bonus is that these events offer networking opportunities concurrently with education. I highly recommend CFA Society Vancouver members take advantage of the continuing education offerings whenever possible."

Mary Lou Miles, CFA
Genus Capital Management Inc.

2. COMMUNITY AND NETWORKING

SOCIAL EVENTS

There are many networking opportunities for you to connect with fellow CFA Society Vancouver members and members from other professional organizations. Our social event calendar includes the annual Monte Carlo Night, Saturday morning "CFA Philosophy Cafe", Happy Hour at HaraHeri, CFA Poker Night, Christmas Dinner Cruise, CFA Team Sun Run and our annual "Women's Luncheon and Connect" celebrating International Women's Day.

New in 2024! CFA Society Vancouver members have a regular opportunity to **informally meet up and network after work** on the 3rd Thursday of every month. Attendees are responsible for paying their own drink/food orders at each meet up and the location is communicated by the Social Committee team via a private **CFA member WhatsApp Group**. (see page 11 for joining details).

ANNUAL COMMUNITY BLOOD DRIVE

We are proud to support this extremely worthy cause during the month of June every year. CFA Society Vancouver members are invited to join our Canadian Blood Services Partner for Life team and make an appointment to donate blood during our blood drive month. Team participants have opportunity to connect with fellow donors at a reserved group donation appointment and be celebrated at our July Social Meet-Up.

"BEYOND THE BOOK"

This is a special offering for CFA Society Vancouver members who have held their charter for 15+ years. **"Beyond the Book" Book Club** meets four times a year to enjoy comradery and literary discussions on book titles decided by club members. Invitations to eligible members are sent in early September and the first meeting is held in November.



CHARTER AWARDS CEREMONY

Each year CFA Society Vancouver hosts a graduation ceremony to celebrate our new charterholders. Our esteemed presenters provide personal insights from their years in the profession while introducing attendees from the class of the previous year. Graduates receive a second, smaller copy of the charter. Photos are also taken to commemorate the event.



ANNUAL DINNER (formerly FORECAST DINNER)

The Annual Dinner is the Society's premier event. This dinner attracts up to 1,000 guests, providing members, their guests and other industry professionals, with the opportunity to hear from well-respected speakers such as David Rubenstein, Steven Eisman and Peter Zeihan.



An important feature of this event from 2026 will be the presentation of the **Michael Ryan Award of Excellence**. In recognition of our founding member Michael Ryan, this award recognizes a CFA charterholder's exemplary contribution to the financial industry through their professional achievements, leadership, community involvement, and endorsement of the CFA charter and the standard of excellence it represents. **Applications open in September.**

VOLUNTEERING

Volunteer to serve on a Society committee or the Board of Directors. Currently 58 members serve on 10 committees that help shape our education offerings, networking events, CFA designation awareness and the direction of the Society itself. See the "Our Committees" section for more details about these committees and the work they do. A call for volunteers occurs mid-year every year.

Our "**Volunteer of the Year**" award is presented at the Annual Dinner.

Past Recipients:

2017: Jon Potter, CFA
2018: Salman Ahmed, CFA & William Wong, CFA
2019: Jessie Bobinski, CFA
2020: Janine Guenther, CFA & Ian Robertson, CFA
2021: Molly Zhao, CFA

2022: Cindy Hu, CFA
2023: David Smith, CFA
2024: Karoline Luedemann, CFA
2025: Adele Liu, CFA & Roland Goh, CFA

"CFA Society Vancouver and its many volunteers put on a strong selection of high quality topical, educational and social events every year. I try to make as many as I can, and every member should make a point of attending at least a few, it is time well spent."

Paul Martin, CFA
Phillips, Hager & North Investment Management

3. DISCOUNT PROGRAMS AND SPECIAL OFFERS



CFA SOCIETIES GLOBAL PASSPORT PROGRAM

The Global Passport Program allows members of participating CFA societies to attend each other's society events at the local member price. Contact the local society using the Society Directory on the CFA Institute website to learn about eligible events and other networking opportunities.

<https://www.cfainstitute.org/societies>.



PERKOPOLIS

Perkopolis is an online discount program that provides companies and associations across Canada with access to exclusive discounts on various products and services. CFA Society Vancouver qualifies to offer our members access to these discounts. Contact Suzanne smartin@cfavancouver.com to receive your unique member ID code in order to create your personal account via the Register link on Perkopolis.com.



TEMPO FRAMING

Have your CFA Charter framed in a high quality, Canadian made frame, complete with an acid free mat and emblazoned with the CFA Society Vancouver logo. Choose from a selection of solid hardwood frames in a variety of classic and contemporary styles.

Members are entitled to a 10% discount.

1-800-437-0463

temposales@tempoframing.com



BUSINESS IN VANCOUVER SUBSCRIPTION

To CFA Society Vancouver members – 40% Off Print or All Access Subscriptions. Contact Suzanne for details.

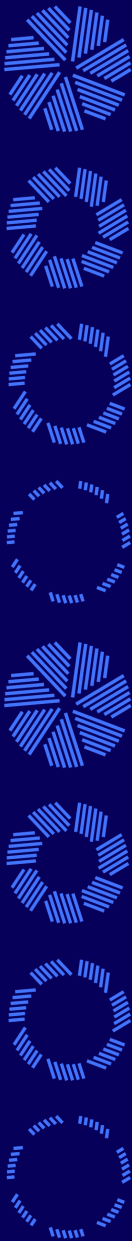
smartin@cfavancouver.com

MORE TO COME!

Our Board



2025-26 Board of Directors



Our Committees

As a Society run by volunteers, CFA Society Vancouver values the contribution its volunteers make to the Society as a whole and to the investment community. The operational workload of CFA Society Vancouver is covered by the following 10 committees.

ANNUAL DINNER

Formerly known as the Forecast Dinner, the Annual Dinner is considered one of CFA Society Vancouver's most prominent events. The team on the **Annual Dinner Committee** are responsible for every aspect of organizing this major event.

Committee Chair: Virginia Coles

AWARENESS

The **Awareness Committee** works to enhance awareness of the CFA brand within the Vancouver investment community, including CFA Society Vancouver members, employers, academia, members of other professional organizations, financial and business media contacts, and the general investing public. The committee is also responsible for creating the bi-annual BC Investment Outlook Newsletter.

Committee Chair: Daman Minhas, CFA

CANDIDATES

The **Candidates Committee** is responsible for providing activities that support candidates in their goal to becoming CFA charterholders. The committee leads events for candidates to learn about different career paths, to prepare for the CFA exams and to network with one another.

Committee Co-Chairs: Falaq Hamirani, CFA and Anthony Lao, CFA

FINANCIAL LITERACY

The focus of the **Financial Literacy Committee** is to partner with relevant non-profit organizations to deliver educational focused events on personal wealth and financial literacy to the general public.

Committee Co-Chairs: Roland Goh, CFA and Adele Liu, CFA

MENTORSHIP

The **Mentorship Committee** facilitates CFA Society Vancouver's Mentorship Program. This program offers the opportunity for one-to-one mentoring relationships for CFA charterholders, Charter Pending and LIII Candidate members in order to assist them with attaining their professional goals and maximizing their potential.

Committee Chair: Rachit Tibrewala, CFA



PROGRAMS

The **Programs Committee** provides educational speaker events, programs and workshops that fit the mandate and strategy of CFA Society Vancouver and the requirements of CFA Institute. The objective is to ensure quality programming is available for our CFA Society Vancouver members, CFA candidates, and other interested finance professionals.

Committee Co-Chairs: Amar Pandya, CFA and Rachel Ni, CFA

SOCIAL

The **Social Committee** organizes events that facilitate social interactions between CFA Society Vancouver members and other industry professionals with a vision to create long term personal and business relationships. They aspire to present affordable, professional and enjoyable functions throughout the year – both on their own and in collaboration with other professional organizations.

Committee Chair: Craig Withers, CFA

SPONSORSHIP

The goal of the **Sponsorship Committee** is to introduce CFA Society Vancouver to a variety of sponsors that may be interested in partnering with the Society for major events and initiatives that support our mission to promote best practices and the highest professional and ethical standards in the investment industry. Sponsorship opportunities include the Annual Dinner, seminars and workshops, and networking events.

Committee Chair: Virginia Coles

UNIVERSITY OUTREACH

The **University Outreach Committee's** goals are to increase awareness of the designation amongst students and to enhance the Society's relationships with local universities and colleges. The committee also supports CFA Institute's Research Challenge and CFA Societies Canada's Ethics Challenge.

Committee Co-Chairs: Michael Mak, CFA, Milton Lu, CFA and Nick Lum, CFA

VOLUNTEERS

The **Volunteers Committee** recruits and supports Society volunteers by organizing an annual kick off event, summer appreciation event, as well as several other team building events throughout the year. The commitment of our Society volunteers is important to the success of CFA Society Vancouver, so the committee works hard to ensure volunteers are engaged.

Committee Chair: Virginia Coles



Stay Connected



EVENTS NEWSLETTER (Weekly)

Look out for this one each week. It provides a full list of our upcoming events with registration links. Events hosted by partner organizations are also featured.

MEMBER NEWSLETTER

This publication provides you with society news, CFA Institute announcements, advocacy updates and other items of interest. An important feature of the newsletter is “Your Voice”. This [online comment box](#) is open 24/7 – 365 for you to share your comments and feedback anytime.

CAREER NEWSLETTER

Providing job board updates, career focused events and other resources from the society, CFA Institute and other professional sources.



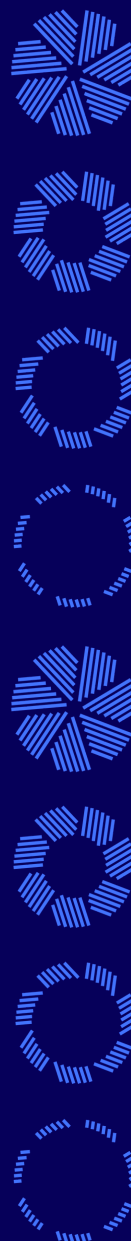
LINKEDIN

Connect with us on [LinkedIn](#) to receive regular event and job board updates, articles of interest, society event images and videos.



PRIVATE MEMBER WHATSAPP GROUP

Join to receive the monthly social meet up notifications. (Refer to Pg 5 for further details on this new Social Committee initiative). If you're not on the group chat, you won't know where the group will be getting together! To request to join, use your phone to [access here](#) or scan the **QR code**. Once approved, you will have access to the updates.



Other Membership Info



UPDATING YOUR CONTACT DETAILS

Update your email, mailing address and employment details online through your CFA Institute account at www.cfainstitute.org.

RENEWING YOUR MEMBERSHIP

Your membership year with CFA Institute and CFA Society Vancouver runs from July 1 to June 30.

- Membership renewal is due by July 31.
- Both membership fees are paid to the CFA Institute through your online account at www.cfainstitute.org



LOCAL MEMBERSHIPS

Our society **Candidate Associate Membership** is available to BC candidates currently enrolled in the CFA Program. This membership is optional, but strongly encouraged. [More membership details, benefit comparison and application forms.](#)

New in 2025:

Our new society **Retired Associate Membership** is available to CFA Charterholders in Vancouver who are retired from their professional financial position and no longer need to maintain the CFA designation. It is a local society membership specifically catering to this cohort of retired members who wish to stay connected to the Vancouver CFA community and local member offerings and are not yet eligible to receive the complimentary CFA Institute and society memberships (70+ years old).

[More information and application form](#)

Local membership details:

- Membership year runs July 1 – June 30
- Join anytime throughout the year
- Annual fee CDN\$70 (not prorated)



Contact Us

OUR ADMINISTRATION TEAM

Virginia Coles

Executive Director

info@cfavancouver.com

Direct: 604-985-9889

Suzanne Martin

Membership and Programs Coordinator

smartin@cfavancouver.com

Direct: 604-986-9856

MAILING ADDRESS

PO Box 37005 Lonsdale PO,

North Vancouver, BC V7M 4M4

(Please note: We do not have a physical office address)

SOCIETY WEBSITE

www.cfavancouver.com

Features:

- Upcoming Events and registration links
- Leadership page featuring Board of Directors bios and Annual Reports
- Mentorship Program information and application forms
- Career Resources featuring Society Job Board and Member Career Interviews



SHARE YOUR FEEDBACK

We welcome your feedback via the following channels:

- Regular Event surveys and special Member surveys
- The "[Your Voice](#)" section in the Member e-Newsletter
- Email to Virginia Coles, Executive Director

