

Session 2: CFA Personal Journeys Robin Koroluk, CFA and Jordan Wilson

A follow-up to Session 1: CFA: “Chartered Financial Analyst”, but also “Careers For All”.

In this session, Robin Koroluk and Jordan Wilson draw on their personal and career experiences to flesh out many of the topics covered in the formal presentation. With vastly different career paths, Robin and Jordan share many great examples and offer advice to those considering the CFA Program.

00:25 Robin Koroluk Introduction

4:45 Jordan Wilson Introduction

8:10 Finance Majors and the CFA Program

Did Robin’s finance major perfectly prepare her for writing CFA Level Exams?

How deep and wide is the CFA Program curriculum?

How is it to work a full-time job and be in the CFA Program at the same time?

Do employers provide support for Candidates in the CFA Program?

Are there non-CFA courses to take, that help prepare for beginning the CFA Program?

Is it better to start the CFA Program immediately after University? Or to wait a few years and gain some practical experience?

22:45 Accounting, then Finance

Why did Jordan pursue his financial accounting designation before moving into finance?

Do accounting skills assist in passing the CFA Level Exams?

How much of the CFA Levels Exams require financial accounting knowledge?

What other technical skills can enhance a career in finance?

29:50 CFA Career Opportunities in Saskatchewan

What are the job prospects for CFAs wishing to work in Saskatchewan?

Do CFAs only work as financial analysts or in the investment sector?

Does it make sense for non-finance professionals to pursue the CFA designation?

Financial analysts sound boring. Are there roles for extroverts, with more excitement?

What about job pressure? “9 to 5” stability versus higher stress?

What about compensation? Steady paycheck versus “eat what you hunt”?

40:20 CFAs versus

How does a CFA designation compare with a Chartered Professional Accountant (CPA)?

Or Certified/Registered/Personal Financial Planners (CFP/RFP/PFP)?

Or a Master of Business Administration (MBA)?

What about skill and experience differences within a specific designation?

Do securities regulators care if employees have a CFA, CFP, CPA, or MBA?

51:48 Complementary “Hard” and Useful “Soft” Skills to Develop

Do CFAs require industry experience?

Behavioural finance skills?

Human Resources and Staff Management?

Leadership and Team Dynamics?

Communication and Interpersonal?

Analytical and Problem Solving?

Foreign Languages and Cultural Appreciation?