

CFA Career Chats: Paula Meier, CFA

Paula Meier joins Jordan Wilson to discuss her education, career, and juggling a young family.

Paula holds a Bachelor of Business Administration from the University of Regina majoring in Finance, as well as the CFA designation.

Paula Meier is an Associate, Fundamental Research, Public Equities at TD Asset Management. Paula provides equity research and investment recommendations for the Public Equity portfolios, covering the global Real Estate sector. She has prior experience in the utility, IT, and consumer sectors.

Paula has served on the CFA Society Saskatchewan Board since 2017 and is currently the Board Secretary. Paula is also involved with a few charitable organizations in Saskatchewan.

01:55 What led Paula to choose Finance in University and then pursue a career as an Equity Analyst?

05:50 How was the job market for finance majors upon graduating from University?

07:15 Why was the Coop Program instrumental in getting a full-time position in finance?

09:45 What is a key factor in getting the job offer for young professionals?

13:00 Is a narrow or broad focus on skills and knowledge better when building a career path?

15:30 Start the CFA Program immediately after University or wait a few years?

19:13 What does an Equity Analyst do at TD Asset Management?

21:30 How do Institutional or Pension clients differ from Individual investors?

25:40 How is an Equity Analyst compensated at TD?

27:20 What is the difference between “Buy-Side” and “Sell-Side”?

30:45 How is the job pressure working as an Equity Analyst?

33:30 How do Analysts learn about the industries they cover?

37:05 What will be the growth industries over the next decade?

42:00 How do short-term versus long-term performance expectations

impact investing?

47:30 Is investing success the sign of great skills, or possibly luck? How to assess results?

50:30 Why are “soft” skills important to develop? What “soft” skills are highly useful?

59:29 Having a young family, how does Paula juggle her career and maintain a work-life balance?

67:00 What advice would Paula give to 17 or 24 year old Paula?