

Diversity Matters

In this session, Robin Koroluk and Jordan Wilson discuss diversity in finance.

Robin draws on her experience as a woman in the Saskatchewan wealth management sector. Jordan from his years living and working around the world. An interesting discussion on the current situation. Why there is a lack of gender diversity in finance. And what can be done to improve things.

1:45 Women in Wealth Management

What led Robin to become a finance major and pursue a career in wealth management?

What is a wealth manager?

Do wealth managers spend their days in a back-office, crunching numbers?

What sort of skills are important for wealth managers?

What about “soft” skills?

Why is it important for advisors to connect with clients on a personal level?

8:25 Global Finance Experiences

What was diversity like in the Caribbean financial services sectors?

How did that experience compare with Asia and Switzerland?

Do people need to step out of their “comfort zones”?

How hard is it to juggle a family and maintain a career?

What about work-life balance, in general?

How are changing demographics impacting work-life balances?

18:50 Career Uncertainty in Finance and Women’s Choices

Why are women underrepresented in finance?

With similar skills and work levels, why do women flock to accounting and law?

Is the lack of career certainty a factor in women staying out of finance?

What are companies and the CFA Institute doing to attract women?

How can women find out more about pursuing a finance career?