



Host Jordan Wilson, CFA, CPA (CA), CFP

Jordan is President of Wilson Wealth Management, a boutique, fiduciary, wealth management firm based in Saskatoon.

Jordan has a Bachelor of Commerce from the University of Alberta and holds CFA, CPA, CA, and CFP professional designations.

Jordan has over 25 years experience in various areas, including: public accounting and tax; oil and gas industry; taking an oil company public as VP-Finance, Treasurer, and Board member; international finance in The Bahamas, Cayman Islands, and Switzerland; investment analysis of bankable, non-bankable, and operating assets; product and risk management; mergers and acquisitions; managing the Global Trust Operations for UBS.

Over his career, Jordan has served on the Boards of over 100 companies, including non-profit, public, private operating, and investment companies. Since joining the CFA Society Saskatchewan Board in July 2018, Jordan has been heavily involved in Candidate Preparation and University and High School Outreach activities.