



CFA Career Chats: Juliana Wong, CFA

Juliana Wong joins Jordan Wilson to discuss her career trajectory and lessons learned. From her time growing up in Vancouver until now. An interesting discussion on education, career paths, and work advice.

Juliana is a Senior Capital Markets Director at Concentra Bank. She manages Concentra's funding pricing through wholesale market, indirect channels, and capital markets. Also, Juliana oversees liquidity in terms of portfolio investments, cash management, and management of credit facilities. Prior to Concentra, Juliana worked at a Pension Investment Firm and an Asset Management Company.

Juliana graduated from the University of British Columbia with a Bachelor of Arts (mathematics and economics) and is a CFA Charterholder.

Juliana joined the CFA Society Saskatchewan Board of Directors in 2015. She has previously served as Secretary, Treasurer, Vice-President, and is currently the Society's President.

In this episode, Jordan and Juliana discuss:

2:25 What led Juliana to major in Economics and Mathematics in University?

4:25 CFA Society Saskatchewan has 3 Economics majors on its Board in 2021. Why so many? What are the career options for those with Economics degrees?

6:25 What led Juliana to shift from Economics and pursue the CFA designation?

8:00 Did having a strong economics background assist in the CFA Program?

9:15 Why is it important for CFAs to have strong economics knowledge, regardless of education?

12:45 Should CFA Candidates enter the CFA Program in their final year of University, or shortly after graduating? Or does it make more sense to wait and develop some practical finance experience?

15:00 How and why Juliana made the move from Vancouver to Regina.

16:40 When working, should employees specialize or consider more general skill sets to develop?

19:00 Are there finance positions and careers for graduates who wish to work in Saskatchewan?

21:40 What does Juliana do at Concentra Bank? How has her career progressed over time?

25:15 How are employees compensated at Concentra? “Eat what you hunt” or salary? What about the daily job risk versus stability for employees?

28:20 Women are underrepresented in finance positions. What has been Juliana’s experience as a female in finance?

30:00 Work-life balance is an issue for today’s employee. What are Juliana’s thoughts on this in Saskatchewan finance-related functions?

33:45 What sort of non-finance technical skills should younger professionals develop to become more attractive for open finance jobs?

37:00 What about developing knowledge in the main industries where one will work?

44:05 What sort of softer skills should young professionals develop to enhance their resumes?

46:00 What advice would today’s Juliana tell High-School Juliana about career paths?