CFA Career Chats: Mark Smith-Windsor, BA (Economics), CPA, CMA, CFA

Mark Smith-Windsor joins Jordan Wilson to discuss his education, career path, CFA designation, and much more.

Mark is a Portfolio Manager and Investment Advisor with IA Securities in Saskatoon.

Mark holds a Bachelor of Arts in Economics from the University of Saskatchewan. Mark also possesses his CPA, CMA designation and is a CFA Charterholder.

Mark provides his thoughts on:

0:00 Introduction

2:00 Why major in Economics? Did that education assist in your finance career?

6:00 Did you initially work in an economics related job or start straight in finance?

10:30 Did having an economics education help or hinder you in the CFA Program?

17:10 How has your career progressed since graduating from university?

23:25 What is the difference between a Team Approach and One on One?

32:00 What is the role of a Portfolio Manager?

38:45 What are “Know Your Client” rules and why are they important?

41:45 What “soft” skills are important to develop?

50:30 What complementary “hard” skills are worth adding to your repertoire?

55:45 What industries and/or skills may become important in the next decade?

58:15 What are some considerations when investing in small, resource firms?

1:05:00 How is investing in smaller, private companies different from large, public firms?

1:08:40 What advice would Mark give to his High School or University age self?