



CFA Society
Vancouver

MEMBER HANDBOOK

2022-2023



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Thank you for being a valued member of CFA Society Vancouver, and welcome to the 2022-23 edition of our Member Handbook. I encourage you to peruse the Handbook to get an idea of the many benefits that accrue to you from your membership.



*Elvis Picardo, CFA, CIM
President*

Our Society now has over 1,900 members – and counting – making it the third-largest CFA Society in Canada. Our membership continues to grow apace, driven by new charterholders, and charterholders who have moved to the Lower Mainland from elsewhere.

Our members are employed in a variety of professions, including analysis, banking, investment counselling, portfolio management, research, teaching and technology. They range from new charterholders at the start of their careers, to senior managers and C-suite executives.

To satisfy this diverse audience, our Society offers something for everyone. In addition to our largest events featuring world-class speakers such as the Annual Dinner, we offer numerous events and workshops on topical subjects throughout the year. We also offer career development tools such as focused presentations, a popular mentorship program and an active job board. Social events hosted by our Society include Monte Carlo night, a book club and an "Ugly Christmas Sweater" party, as well as family-friendly events like CFA Family Day at the Vancouver Symphony Orchestra and "Bard on the Beach." Our community initiatives include a blood drive, financial literacy outreach and donations to worthy causes.

All these events offer rich opportunities for networking and connecting with your peers. Having attended dozens of events over the years, I can personally vouch for the sense of camaraderie and kinship that you feel from attending our events.

As our top goal for the year ahead is enhancing member value and boosting engagement, we will continue to expand our program offerings and member benefits. In this regard, our steady transition to in-person events is particularly exciting, as things return to normal after two long years.

In closing, I would like to thank the many people involved in running our Society – the Board of Directors, staff, and volunteers – for their dedication and efforts. I thank you for your support and look forward to your continued participation in our Society. Together, we will continue to uphold our Society's reputation as one of the most vibrant and dynamic worldwide.

*Sincerely,
Elvis Picardo, CFA, CIM
President*



CFA Society Vancouver is a not-for-profit organization that supports professional development and advancement of CFA charterholders. Our membership consists of over **1,900 regular and affiliate members** representing a wide range of companies. The vast majority of our members are in the financial and investment industries holding various positions such as investment counselors, pension fund managers, portfolio managers, financial analysts, investment bankers, corporate bankers, and treasury managers.

Founded in 1965, CFA Society Vancouver (formerly The Vancouver Society of Financial Analysts), is the local member chapter of **CFA Institute** and one of the 12 Canadian member societies that collaborated with CFA Institute to form **CFA Societies Canada**. CFA Institute is the global body that administers the Chartered Financial Analyst curriculum and sets voluntary, ethics based performance-reporting standards for the investment industry.

CFA Society Vancouver is the **third largest society in Canada** – 17th largest society globally.

HIGHLIGHTS AND AWARDS

- Hosted the **CFA Institute Annual Conference** – 2008
- CFA Institute **Society Excellence Award** – 2013
- Pioneered a highly successful **Women's Symposium** – 2013
- CFA Institute **Society Collaboration Award** – 2015
- Celebrated our **50 Year Anniversary** – 2015
- Recipient of three CFA Institute **Society Excellence Awards** – 2017
 1. Most Outstanding Society
 2. Volunteer of the Year – David Smith, CFA
 3. Advance Professionalism & Professional Recognition – in collaboration with the Canadian CFA Societies
- CFA Institute **Society Excellence Award** – 2018
- Hosted CFA Institute **Americas Society Leadership Conference** – 2018
- **Record attendance** of 1,190 at our **42nd Annual Forecast Dinner** – 2020



OUR MISSION

To lead the investment profession in the Greater Vancouver area by promoting the highest standards of ethics, professional development, and professional excellence for the ultimate benefit of society.

OUR VISION

To serve CFA charterholders and candidates in Greater Vancouver by providing investment related programming and professional development, and to increase the awareness of the CFA designation with the investing public and employers. Further, to be the voice of the CFA charterholder and candidate in the areas of ethics and excellence of practice.

YOUR MEMBERSHIP BENEFITS

CFA Society Vancouver strives to provide exceptional local member services to current and future charterholders and investment professionals in the following three areas:

1. Continuing Professional Development
2. Community and Networking
3. Discount Programs and Special Offers

CONTINUING PROFESSIONAL DEVELOPMENT

EVENTS AND WORKSHOPS

Our Programs Committee co-ordinates over 15 events per year, sourcing speakers and topics to give you a career edge, help serve the needs of your clients and firm, maintain the integrity of your CFA charter and help keep you current with industry standards and trends.



Special Member pricing applies. Register for events using the email address you use with CFA Institute to obtain this pricing.

Event specific emails are sent to you once an event is open for registration.

A **calendar of upcoming events** can be found on the Society website –

www.cfavancouver.com along with registration options.

Watch out also for **complimentary Member events!**

CAREER DEVELOPMENT PRESENTATIONS

Part of CFA Society Vancouver's broader Career Development focus, is to offer a varied suite of career skills presentations and workshops each year. Topic examples include negotiation, public speaking & presentations, personal branding and time management. Member pricing applies.

JOB BOARD

[CFA Society Vancouver's Job Board](#) can be found on our website and is connected to **CFA Institute's Career Center**. Members can view available positions in Vancouver and across Canada.

MENTORSHIP PROGRAM

The CFA Society Vancouver's Mentorship Program is a powerful **exclusive charterholder member benefit** that launched in January 2017. It is a year-long program running January to December that pairs industry-experienced mentors with entry and mid-level professionals in the investment industry.

The Program kicks off in September with an **Information Session** open to all interested Charterholder members and (new in 2021) LIII Candidate members. Applications are accepted until mid-October and successful pairings are required to attend a "Break the Ice" Session in December. Support and check-ins are scheduled throughout the Program year.

For more information visit the [Mentorship Program](#) page on our website.



PROFESSIONAL LEARNING (PL) PROGRAM

This voluntary CFA Institute program enables you to earn credit for participating in professional development activities that increase your industry knowledge, skills and abilities as an investment professional. Many Society presentations and workshops are PL eligible and the credit is submitted on your behalf.

"As a long time CFA Society Vancouver member, and portfolio manager working with high net worth clients, I find the offerings of options for continuing education from CFA Society Vancouver exemplary. Even if the topic isn't specifically targeted to my day to day role, it offers insight into the industry and increased knowledge of capital markets and the economy. The added bonus is that these events offer networking opportunities concurrently with education. I highly recommend CFA Society Vancouver members take advantage of the continuing education offerings whenever possible."

Mary Lou Miles, CFA
Genus Capital Management Inc.

YOUR MEMBERSHIP BENEFITS

COMMUNITY AND NETWORKING

SOCIAL AND FAMILY EVENTS



There are many other opportunities for you to connect with fellow investment professionals in addition to the professional topic events and workshops. Our **social events** include the annual Monte Carlo Night, Wine Tasting, a Saturday morning "Coffee with Philosophy", summer night at the Baseball Game, CFA Tournament Poker Night, Ugly

Christmas Sweater Party and CFA Family "Bard on the Beach" event.



ANNUAL DINNER (formerly FORECAST DINNER)

The **Annual Dinner** is the Society's premier event. This dinner attracts over 800 guests, providing members, as well as other industry professionals, with the opportunity to entertain their clients and hear from well-respected speakers such as Geoff Colvin, Peter Tertzakian and David Rubenstein. In 2020 we hosted **Steven Eisman** as our keynote speaker to a record attendance of 1190 – our largest audience to date. We switched to the virtual stage in 2021, hosting economist **David McWilliams** and in 2022 geopolitical strategist and author, **Peter Zeihan**.



CFA DAY

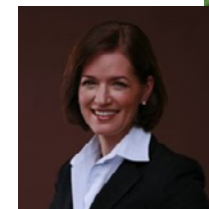
In 2022 we were excited to bring back **CFA Day** for members, candidates and the investment community. This special event is designed to highlight the CFA designation, acknowledge our members and hear from an engaging keynote speaker. **Bruce Sellery** entertained us virtually in 2022.



In 2023, we will be introducing a new **CFA Awards** component to this important event. As nominated and voted by CFA Society Vancouver members leading up to the event, we will be recognizing an up and coming member; a member who has achieved excellence within the industry; and presenting a lifetime achievement award to someone who has not only contributed to the profession, but to the community as a whole.

SPECIAL SPEAKER EVENTS

In addition to our continuing education events, you have the opportunity to attend events with special speakers who provide a variety of topical perspectives. Such speakers have included **David Chilton**, **Carla Harris**, Bank of Canada's Senior Deputy Governor **Carolyn Wilkins** and author **Susan Cain**. Most recently we have welcomed **Margaret Franklin**, President and CEO of CFA Institute, author **Morgan Housel** and Enron's former CFO, **Andrew Fastow** to our virtual stage.



CHARTER AWARDS CEREMONY

Each year CFA Society Vancouver hosts a **graduation ceremony** to celebrate our new charterholders. Keynote speakers provide insights into the profession and graduates will receive a second, smaller copy of the charter. Photos are also taken to commemorate the event.



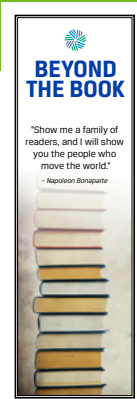
"CFA Society Vancouver and its many volunteers put on a strong selection of high quality topical, educational and social events every year. I try to make as many as I can, and every member should make a point of attending at least a few, it is time well spent".

Paul Martin, CFA
Phillips, Hager & North Investment Management

YOUR MEMBERSHIP

"BEYOND THE BOOK"

A special offering for CFA Society Vancouver members who activated their membership and/or have held their charter for 15+ years. **"Beyond the Book" Book Club** meets four times a year to enjoy comradery and literary discussions on book titles decided by club members. The book club membership year runs August 1 – July 31. Invitations to eligible members are sent in August and the first meeting is held in the fall.



VOLUNTEERING

Volunteer to serve on a Society committee or the Board of Directors. Currently 59 members serve on 10 committees that help shape our education offerings, networking events, CFA designation awareness and the direction of the Society itself. See the "Our Committees" section for more details about these committees and the work they do. A call for volunteers occurs mid-year every year. Our **"Volunteer of the Year"** award is presented each year at the Annual Dinner.



Previous Recipients:

2017: Jon Potter, CFA

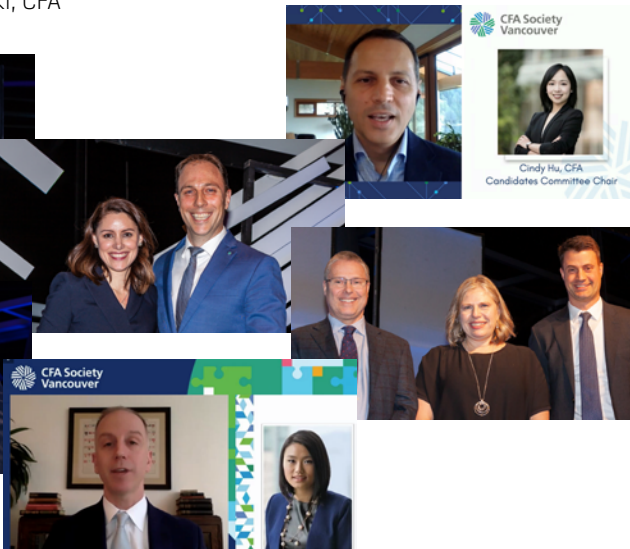
2018: Salman Ahmed, CFA and William Wong, CFA

2019: Jessie Bobinski, CFA

2020: Janine Guenther, CFA and Ian Robertson, CFA

2021: Molly Zhao, CFA

2022: Cindy Hu, CFA



DISCOUNT PROGRAMS AND SPECIAL OFFERS

CFA SOCIETIES GLOBAL PASSPORT PROGRAM



The **Global Passport Program** allows members of participating CFA societies to attend each other's society events at the local member price. Contact the local society using the Society Directory on the CFA Institute website to learn about eligible events and other networking opportunities.

<https://www.cfainstitute.org/societies>.

PERKOPOLIS



Perkopolis is an online discount program that provides companies and associations across Canada with access to exclusive discounts on various products and services.

CFA Society Vancouver qualifies to offer our members access to these discounts.

Contact Suzanne smartin@cfavancouver.com to receive your unique member ID code in order to create your personal account via the Register link on Perkopolis.com

TEMPO FRAMING



Have your CFA Charter framed in a high quality, Canadian made frame, complete with an acid free mat and emblazoned with the CFA Society Vancouver logo.

Choose from a selection of solid hardwood frames in a variety of classic and contemporary styles.

Members are entitled to a 10% discount. Tel: 1-800-437-0463

Email: temposales@tempoframing.com

BUSINESS IN VANCOUVER SUBSCRIPTION

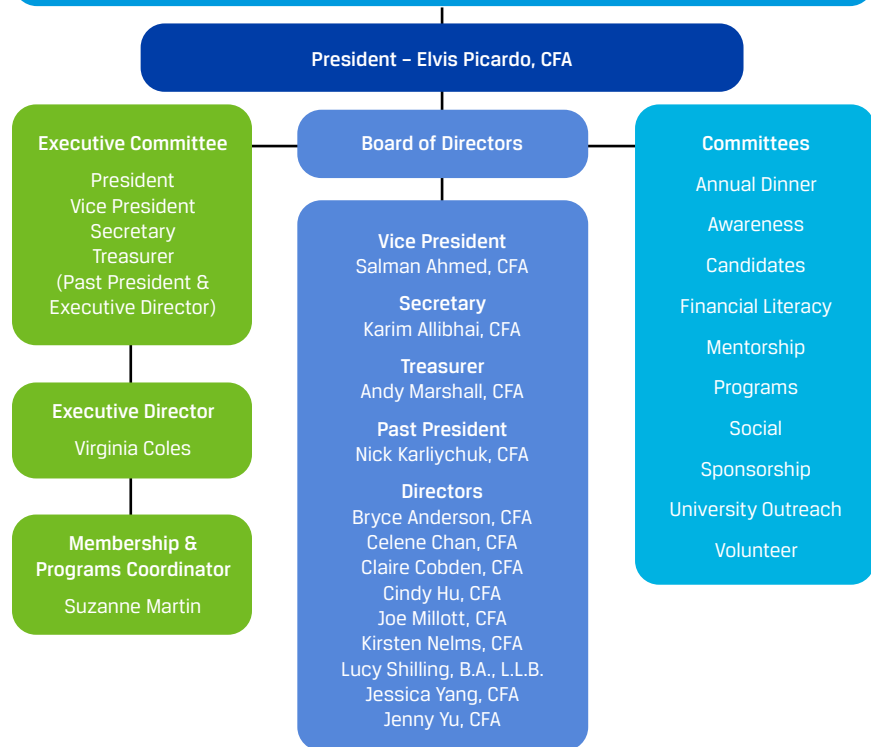


To **CFA Society Vancouver members** - 40% Off Print or All Access Subscriptions. See details in the monthly member newsletter or contact Suzanne smartin@cfavancouver.com

OUR BOARD



Members | Candidates | Academia | High Net Worth Investors



OUR COMMITTEES

As a Society run by volunteers, CFA Society Vancouver values the contribution its volunteers make to the Society as a whole and to the investment community. The operational workload of CFA Society Vancouver is covered by the following 10 committees.

ANNUAL DINNER

Formerly known as the Forecast Dinner, the Annual Dinner is considered one of CFA Society Vancouver's most prominent events. The team on the **Annual Dinner Committee** are responsible for every aspect of organizing this major event.

Committee Chair: Salman Ahmed, CFA



AWARENESS

The **Awareness Committee** works to enhance awareness of the CFA brand within the Vancouver investment community, including CFA Society Vancouver members, employers, academia, members of other professional organizations, financial and business media contacts, and the general investing public. The committee is also responsible for creating the bi-annual BC Investment Outlook Newsletter and overseeing the society's social media activity.

Committee Chair: Daman Minhas, CFA



CANDIDATES

The **Candidates Committee** is responsible for providing activities that support candidates in their goal to becoming CFA charterholders. The committee leads events for candidates to learn about different career paths, to prepare for the CFA exams and to network with one another.

Committee Co-Chairs: Karoline Luedemann, CFA and Estelle L'Heureux, CFA

OUR COMMITTEES

FINANCIAL LITERACY

The focus of the **Financial Literacy Committee** is to partner with relevant non-profit organizations to deliver educational focused events on personal wealth and financial literacy to the general investing public.

Committee Chair: Roland Goh, CFA

MENTORSHIP AND CAREER DEVELOPMENT

The **Mentorship Committee** facilitates CFA Society Vancouver's Mentorship Program. This program offers the opportunity for one-to-one mentoring relationships for CFA charterholders in order to assist them with attaining their professional goals and maximizing their potential. This committee is also responsible for organizing career skills presentations and workshops throughout the year.

Committee Co-Chairs: Sahar Sharafzadeh, CFA and Gary Wong, CFA

PROGRAMS

The **Programs Committee** provides educational events and programs that fit the mandate and strategy of CFA Society Vancouver and the requirements of CFA Institute. The objective is to ensure quality programming is available for the CFA Society Vancouver membership and candidates, clients, investors and other professionals.

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Committee Chair: Molly Zhao, CFA

SOCIAL

The **Social Committee** organizes events and projects that facilitate social interactions between CFA charterholders, candidates and other industry professionals with a vision to create long term personal and business relationships. They aspire to present affordable, professional and enjoyable functions throughout the year - both on their own and in collaboration with other committees and professional organizations.

*Committee Chair:
Darrin De Stephanis, CFA*

SPONSORSHIP

The goal of the **Sponsorship Committee** is to introduce CFA Society Vancouver to a variety of sponsors that may be interested in partnering with the Society for major events and programs, and supporting our mission to promote best practices and the highest professional and ethical standards in the investment industry. Sponsorship opportunities include the Annual Dinner, seminars and workshops, and networking events.

Committee Chair: Virginia Coles

UNIVERSITY OUTREACH

The **University Outreach Committee's** goals are to increase awareness of the designation amongst students and to enhance the Society's relationships with local universities and colleges. The committee also supports CFA Institute's **Research Challenge** and CFA Societies Canada's **Ethics Challenge**.

Committee Co-Chairs: Lisa Meger, CFA and Yoel Tewelde

VOLUNTEER

The **Volunteer Committee** recruits and supports Society volunteers by organizing an annual orientation and appreciation event, as well as several team building events throughout the year. The commitment of our Society volunteers is important to the success of CFA Society Vancouver, so the committee works hard to ensure volunteers are engaged.

Committee Chair: Virginia Coles



"When I moved to Vancouver, I thought building a network was going to be a challenge. However, I've met lots of like-minded people at networking, educational, and social events CFA Society Vancouver organizes. It even inspired me to volunteer with the Society, so that I can help others have a similar experience".

Salman Ahmed, CFA
Steadyhand Investment Funds

STAY CONNECTED

From e-Newsletters to multiple social media platforms, there are many ways to keep updated and connected!

EVENTS E-NEWSLETTER (Weekly)

Look out for this one each week. It provides a full list of our **upcoming events** with registration links.

MEMBER E-NEWSLETTER (alternate months)



This publication provides you with society news, CFA Institute announcements and other articles of interest.

An important feature of the newsletter is "Your Voice". This [online comment box](#) is open 24/7 - 365 for you to share your comments and feedback anytime.

CAREER E-NEWSLETTER (alternate months)

Providing a listing of job board updates, career focused events and other resources from both the society and CFA Institute. A feature of this publication is the Inspiring Paths section highlighting members who have shared their career path experiences and words of wisdom.

SOCIAL MEDIA

Connect with us via **Social Media** to receive regular event updates, articles of interest, society event images and videos.



[Twitter](#) @cfavancouver

Topical articles and live event tweets



[LinkedIn](#)

Topical articles, society news and event notifications



[Instagram](#) @cfasocietyvancouver

Event image gallery



[WhatsApp](#) Group

Join to chat with other CFA Society Vancouver members and find out who else is going to an upcoming event. [Use this QR code to join the group!](#)



OTHER MEMBERSHIP INFO



CFA Institute

UPDATING YOUR CONTACT DETAILS

- Update your email, mailing address and employment details online through your **CFA Institute account** at www.cfainstitute.org

RENEWING YOUR MEMBERSHIP

- Your membership year with CFA Institute and CFA Society Vancouver runs July 1 – June 30.
- Membership renewal is due by **July 15**.
- Both membership fees are paid to the CFA Institute through your online account at www.cfainstitute.org



CFA Society Vancouver

MEMBERSHIP FOR CFA CANDIDATES

It is the goal of CFA Society Vancouver and its directors to ensure candidates have support to be successful in passing the CFA Program exams.

Our society **Candidate Associate Membership** is available to BC candidates currently enrolled in the CFA Program. This membership is optional, but strongly encouraged.

- Membership year runs July 1 – June 30
- Join anytime throughout the year
- Annual fee CDN\$70 (not prorated)

Visit [CFA Society Vancouver's website](#) for more membership details and benefit comparison.



CONTACT US

OUR ADMINISTRATION TEAM

Virginia Coles

Executive Director

info@cfavancouver.com

Direct: 604-985-9889

Suzanne Martin

Membership and Programs Coordinator

smartin@cfavancouver.com

Direct: 604-986-9856

MAILING ADDRESS

PO Box 37005 Lonsdale PO,
North Vancouver, BC V7M 4M4

(Please note: We do not have a physical office address)

SOCIETY WEBSITE

www.cfavancouver.com

Features

- **Upcoming Events** and registration links
- **Leadership** page featuring Board of Directors bios and Annual Reports
- **Mentorship Program** information and application forms
- **Career Resources** featuring Society Job Board and Member Career Interviews

GIVING US FEEDBACK

We welcome your regular feedback via the following channels:

- Regular **Event surveys** and special annual **Member surveys**
- The "**Your Voice**" section in the monthly Member e-Newsletter
- **Email** to Virginia Coles, Executive Director



**CFA Society
Vancouver**