CFA Society Vancouver

Financial Literacy Outreach

Program overview

Financial Literacy Outreach is an initiative undertaken by CFA Society Vancouver's Financial Literacy Committee.

The aim of the program is to work with established non-profit partners to improve the financial literacy of their constituents by co-hosting events that focus on personal finance education and empowerment.

We believe that the well-being of the society at large can be enhanced through greater awareness of financial issues and concepts that affect our daily lives. Levels of financial literacy vary across the society, so the aim of this program is to reach out to a wide range of groups, including women, indigenous communities, newcomers and youths with a focus on underserved communities. Events can be in the form of online workshops or onsite seminars with topics customized to the needs of the non-profit partners and their constituents.

Our committee volunteers are CFA charterholders who are experienced financial professionals with expertise in personal finance, including investment and financial planning. Events will be free of charge or will have a nominal fee to be collected by the co-hosting non-profit partners.

Event topics

Depending on the needs of participants, the topics can cover a wide range of general or focused personal finance related issues.

Examples of general topics

1. Budgeting and Goal Setting
2. Understanding Personal Banking and Borrowing
3. Getting Started on Investing
4. Building a Retirement Plan
5. Personal Debt and Student Loans

Examples of focused topics

1. Raising Children to be Financially Literate
2. Financial Planning for Women
3. Building a Good Credit Score
4. Impact of Inflation on Financial Goals
5. Finding the Right Financial Advisor

Committee volunteers

Roland Goh, CFA
Committee Co-Chair Roland has more than 20 years of investment experience in both global public and private markets and currently works in the personal banking division at CIBC. In his previous capacity as the Chief Investment Officer, he started the fund management business for a private conglomerate. Prior to that, he held research responsibilities across various geographical regions and asset classes in one the largest family offices based in Singapore. Roland holds a Bachelor of Accountancy from Nanyang Technological University. Other than a CFA charterholder, Roland is also a Chartered Accountant of Singapore. He is passionate about financial literacy and participates regularly in educational focused events.

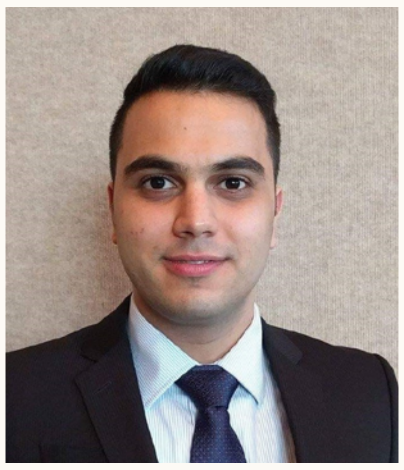
Adele Liu, CFA
Committee Co-Chair Adele is the Regional Head, Wealth Management Credit at RBC. She leads a team of credit professionals working with high net worth clients and supporting Wealth Management Canada’s international private banking business. Adele has 20+ years of experience in financial services, including international trade settlement, risk management, corporate credit, relationship management, etc. She has an MBA with Distinction from the Schulich School of Business in Toronto. Adele is an avid reader and passionate about nature conservation and animal protection. She is the Treasurer and a board member of Nature Vancouver.

Jessica Kong, CFA

Committee Member Jessica is an Investment Counsellor at BMO on the Private Banking team in Vancouver, BC. She collaborates with bankers and a team of specialized planners to help clients make important investment decisions that lead to long-term financial success. She is also a BMO Platinum Award recipient and multi-time BMO Beam and Spotlight Award Recipient. Outside of BMO, Jessica is involved with Junior Achievement Canada where she inspires and prepares young people for success in their higher education and career. Jessica is a member of CFA Institute, CFA Society Vancouver and Women in Capital Markets.

Veer Dhaliwal, CFA

Committee Member Veer is a Manager on Scotiabank's Global Risk Management Team. He's previously worked in commercial banking in various roles since 2019. Veer has been a member of CFA Society Vancouver since 2020 and volunteered for 2 years with the University Outreach Committee before joining the Financial Literacy Committee. He graduated in 2018 with a BBA and a major in Accounting. Veer has been a CFA charterholder since August 2022.



Kamil Aliyev, CFA

Committee Member Kam is an Associate Investment Counsellor at BMO Private Wealth. Kam collaborates with his colleagues at BMO Private Wealth to design integrated solutions that enable clients to achieve their personal wealth goals. Kam offers professional investment management expertise and advice to help individuals and their families achieve their financial goals. Kam takes the time to gain an in-depth understanding of clients' priorities, goals, and unique circumstances, designing and managing portfolios that reflect their values. Kam began his career in finance with one of Canada's largest banks, where he gained valuable skills and experience in investment management, lending, and business expansion. He then joined BMO Private Wealth in 2017. Kam holds a Master's degree in Economics and the Chartered Financial Analyst (CFA) designation. Kam is a firm believer in giving back to society. He serves as a Director on the Board of L'Arche Greater Vancouver.

David Xiao, CFA

Committee Member David has 10 years of experience in financial services and is currently an Associate Advisor at RBC Wealth Management. He and his team are dedicated in providing holistic financial planning solutions for families to help them reach their financial goals. David holds an Honours Business Administration from Ivey Business School and is a CFA Charterholder since 2020. In his spare time he likes to give back to the community by volunteering for various charitable organizations.

Beau White, CFA

Committee Member Beau White is a Chartered Professional Accountant (CPA, CA) and a Chartered Financial Analyst (CFA) Charterholder with over 10 years of work experience in accounting, tax and cash management. She also holds a BCom and a BSc (Economics) from the University of Victoria. Beau is the Director of Treasury and Finance for Sandstorm Gold Royalties where she manages the company's cash, investment and debt balances. She also serves on the Board of Directors for Morien Resources Corp. Previously, Ms. White was an Audit and Assurance Manager for PwC Canada and worked with a large range of clients including individuals, not-for-profit organizations, insurance companies, pension funds and a variety of multi-national, publicly-traded companies. She is passionate about behavioural finance and the psychology behind spending and investing decisions. Outside of work, Beau enjoys playing field hockey and tennis, and going for hikes with her dog.

Mission

To lead CFA Society Vancouver in bringing the benefits of personal financial knowledge to the general public.

Vision

To improve the well-being of the society at large by leveraging the professional knowledge base of CFA Institute.

Affiliation to professional bodies

We work with organizations affiliated with CFA Institute, such as the Financial Literacy Network that brings together resources from other local CFA Societies with established financial literacy programs.

Contacts

For more information or to organize a workshop, please contact our volunteers below.

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