



CFA Society
Vancouver

CAREER INTERVIEW

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“If you decide that this is the career you truly want, then go for it and don't let anything or anyone stop you.”

Can you tell us a bit about your background?

I grew up in Vancouver and went to Prince of Wales Secondary and then UBC (BA/MBA). My dad worked in the mining industry and he would always read the investment section of the newspaper, which got me interested in finance and the markets at a young age.

What was your first job when you started your career, and was it the position you had hoped for?

Definitely not! My first job was a three-month temporary position with an investment firm where I was hired to stamp RRSP forms. I'm not kidding, I would come in every morning and there would be stacks of RRSP application forms on my desk piled several feet high. I would take each form one at a time and stamp it. They must have liked the way I stamped as they offered me a full-time position!

Did you follow a specific career path, change jobs within the same company, and what prompted any job changes?

I didn't follow a specific career path. I kept upgrading my education, which led to a better position each time. You can never be overeducated!

In my first job at an investment firm I completed the Canadian Securities Course and worked as an Assistant Broker for three years. After that, I went on to pursue my MBA in International Finance. When I was 28 years old, I moved to London, UK to work with CIBC Wood Gundy, but it was bad timing because I arrived during a recession, so there was a six-week hiring freeze. I ended up getting a position with them and worked as a Eurobond Dealer for two years. I really enjoyed that job. However, I was starting to miss home, so I told my boss that I was going to move back to Canada. He immediately picked up the phone to call the CIBC Wood Gundy office in Toronto to get me a job. When I corrected him and told him it was Vancouver, he hung up the phone, shook my hand, and wished me luck.

After moving back to Vancouver, I joined RBC Dominion Securities as a broker. Part of my job was making 25 cold calls each morning - I worked hard at it and made President's Club in my first year! It was during my time at RBC DS that I started pursuing the CFA designation. After 18 months there, Leith Wheeler Investment Counsel called and asked if I would be interested in helping start their Private Client practice. I decided that this was a great opportunity and

joined Leith Wheeler as a Portfolio Manager in 1994. After I had my two children, I decided to take a break from work to devote more time to them. While I was away I kept in touch with many Leith Wheeler colleagues, meeting them for lunch regularly. That helped me keep up-to-date with what was happening at the firm, which made my transition back much easier. Leith Wheeler has been a fantastic workplace. They were flexible with my situation and allowed me to take that time off to be with my family, which I appreciate. I rejoined the firm over four years ago and was able to reconnect with a lot of my clients, which has been wonderful.

What advice would you give to someone who is starting his or her career? What advice should they ignore?

I think there are always opportunities available for those who persevere. If you decide that this is the career you truly want, then go for it and don't let anything or anyone stop you. Ignore negative advice/people.

How do you see the industry changing for women? Do you have any advice for young women just starting their careers in Finance?

I think this is a fantastic time for women entering



a career in Finance and I am so pleased to see so many women doing so! Companies are finally realizing the benefits of diversity which is leading to all sorts of opportunities for women. My advice is to be confident in your abilities and focus on the positive. Also, support one another – empowered women empower women!

What impact has the CFA designation had on your career path?

Obtaining the CFA designation had a huge impact on my career as I wouldn't have been able to be a Portfolio Manager without it.

What would a typical day look like for the position you currently hold? What do you enjoy most about your job?

Catching up on significant news and market information particularly as to it pertains to our holdings/portfolios. Meeting with clients and rebalancing portfolios as required.

I enjoy client meetings the most. I'm fortunate that I have some really great clients that I feel that I'm truly able to help. Working with great people (both clients and colleagues) is what makes my job so enjoyable.

What challenges or failures have set you up for later success, (i.e., "favourite failures")? Or, did you encounter any major obstacles in your career path?

When I first started in the business, I had a supervisor tell me that I couldn't take the CSC, when I knew that it was firm policy that I could. I had the nerve to ask a senior executive of the firm if the policy had been changed. I was upset by this, but realized she wanted me to stay in her department. It was disheartening though as I was very young (first job in the industry) and I had hoped that there would have been greater support. It was a good lesson in learning how to stand up for myself and not believing everything I was told.

Looking back on your career, what accomplishment(s) are you most proud of and why?

I am most proud when I feel that I've helped a client achieve their investment goals.

Did you have any mentors or sponsors throughout your career who helped you get to where you are?

Yes! I had an amazing boss that I worked closely with for a number of years. He was always truly

supportive and very disciplined. He had weekly, monthly, 1 year, 5 year and 10 year goals written down which he carried with him in his wallet at all times.

How do you develop yourself outside of work? Are you involved with any organizations or extracurriculars?

I volunteer in the community when I can and sit on the Board of a Not-For-Profit. Staying connected with friends and family is key (and fun!).

What advice would you have for your 20-year-old self?

Be fearless.

Do you have anything left on your bucket list to accomplish?

Of course! There is always room for self-improvement, new opportunities to pursue and exciting things to do!

