



CFA Society
Vancouver

CAREER INTERVIEW

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Manulife

Interview by
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“...have
genuine empathy
and curiosity.”

Can you tell us a bit about your background?

I grew up in Toronto then moved to Vancouver to attend Simon Fraser University on a wrestling scholarship. I believed it would be practical to obtain a Bachelor of Business Administration (BBA) from a highly regarded university so I pursued that degree in addition to wrestling.

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

My first position was not what I had expected; I had thought that I'd pursue law after my BBA so I completed the LSAT. However, I was recruited by London Life as a Financial Security Advisor; a manager there had also participated in university sports so he sought me partly due to my athletic background, which demonstrated my dedication and coachability. My name was given to him by my coach at SFU. All in all, this provided fantastic training and a solid foundation, but I unfortunately realized in short order that there were limitations to satisfying my thirst for knowledge. After working there for just over a year, I decided to pursue a

job which would have greater flexibility and less restrictions when it came to advising clients.

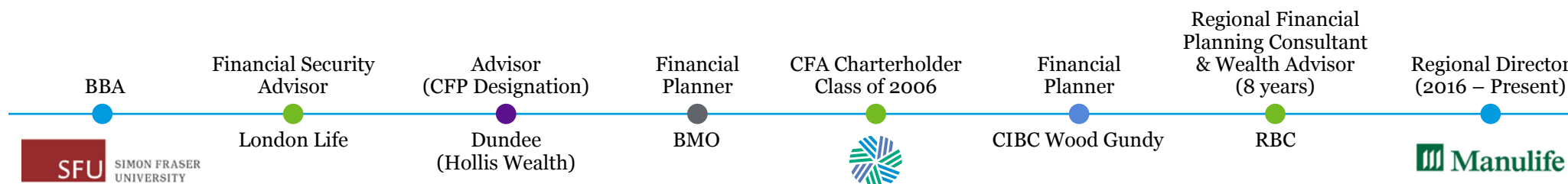
Did you follow a specific career path, change jobs within the same company, and what prompted any job changes?

I knew I wanted to be able to be free of conflicts of interest in my advising of clients, so I pursued a position that had less restrictions in terms of the advice and corresponding recommendations that I provided with what is now known as HollisWealth. Over time, I noticed that even successful senior advisors were still working on the same tasks and with similar clients as junior advisors – just with many more of them. Consequently, I decided that I'd prefer an additional level of specialization and focus on comprehensive planning for clients who had more dynamic and complex needs, such as high net worth (HNW) individuals and business owners. I then became a Financial Planner at BMO while I paid for and completed the CFA designation, despite being strongly discouraged to do so by my immediate supervisor. Afterwards I joined CIBC Wood Gundy's family office initiative where I was

financial planning for select advisor's Ultra High Net Worth clients. Unfortunately, the brainchild of this initiative (currently a mentor of mine) left the organization so I moved on to RBC where I had roles as a Regional Financial Planning Consultant and as a Wealth Advisor at RBC Dominion Securities. I am currently a Regional Director at Manulife.

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

Ignore those who say there are no jobs available in Vancouver! Even though larger cities seem to have more jobs, they also have a lot more people competing for them. Through volunteering and developing relationships with others, many connections and doors can open for you and the types of jobs that those with the CFA designation have can vary greatly. I would also STRONGLY advise against being short sighted in the connections that one develops as this industry is quite small and the majority of roles that I have had were as a result of the connections that I fostered.



What skills or qualities would you believe someone would need to have to succeed in your area of expertise?

A deep knowledge and passion for the wealth management industry in addition to someone who is personable, hard working and entrepreneurial in their thinking.

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

The CFA designation establishes a level of instant credibility and demonstrates that one has both technical and analytical skills across many areas of business and finance.

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

At Manulife I currently have a dual role: I recruit investment advisors to Manulife's IIROC and MFDA platforms and I also assist existing investment advisors to grow and enhance their businesses. I usually have a ton of meetings! With existing advisors, I meet with them to thoroughly understand their businesses. Once I have a better idea where they currently are, I either help them directly or connect them with other available resources, some of which are in my personal network.

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?

I was once let go from a position. Getting fired never feels great and is a huge blow to the ego. However, I later realized that my vision did not align with that position. Having the persistence and dedication to continue on with your vision is rewarding. I also learned that it is not that uncommon (or shameful) to be let go from a firm.

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

Yes! My boss at CIBC Wood Gundy was a wonderful mentor. Though he did not take on the role of a formal mentor, he understood people extremely well and he took me under his wing and helped to develop my skills. I have been raised to figure things out myself, so I haven't gravitated to obtaining a formal mentor. I am, however, re-evaluating this piece as I know how valuable it is to have that relationship with one or a few trusted individuals. My overarching advice in this realm is to develop relationships with people in an altruistic manner and have genuine empathy and curiosity. Try to help others even though you

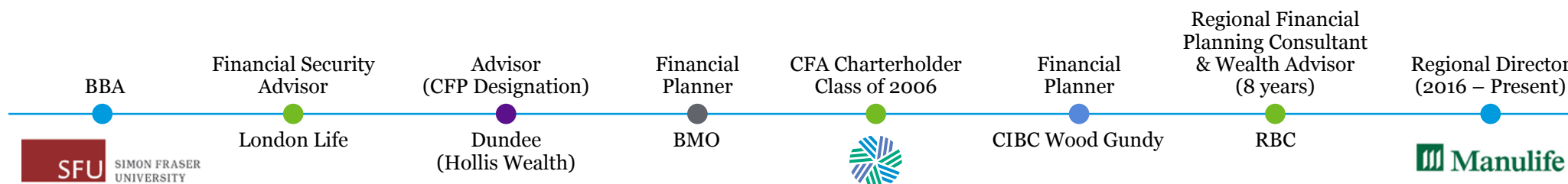
may not get something in return, as you would be surprised what positives unexpectedly return your way.

What book(s) have you most recommended to others? Or, any books that have greatly influenced your life?

Never Eat Alone by Keith Ferrazzi, *The Enlightened Marriage* by Jed Diamond

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

I have been involved in a number of areas. To name a few, I have been a Board Member and mentor in the Mentorship Program for CFA Society Vancouver, a Treasurer for McCreary Centre Society (a not-for-profit organization dedicated to improving the health of BC Youth through research, education and community based projects), and I co-founded the Akoma Ntoaso Mentoring Program (supporting families and youth in the community by bringing together mentors and children who identify as being of African heritage to forge racial, cultural and professional connections). Many of these children are adopted into multiracial families, so there are often distinctive needs present. In volunteering



as a mentor for Akoma Ntoaso, I recently had the pleasure of attending the wedding of one of my mentees who I had known since they were very young!

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

Get greater exposure to all the various career paths and options within finance. Young professionals starting in this field may think the bulk of the job opportunities are only in investment banking or wealth management, but there is so much more. Reach out to those in industry and learn about the possibilities out there.

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

I want to be the best father I can be. A member of the CFA Society Vancouver Board once told me that 'you'll never look back and say I wish I had worked more'. I want to continue to spend time with loved ones.

