Introducing our new Board Members!

CFA Society of Saskatchewan is pleased to present the new Board of directors for 2012-2013.

Jardin Schnurr, CFA, President

Jardin is Portfolio Manager, US Equities at Greystone Managed Investments. In that role he oversees the US Energy, Industrial and Utility sectors for the US portfolio. Prior to joining Greystone in 2006, Jardin held an analyst position at Scheer, Rowlett & Assoc. Investment Management in Toronto. Jardin has served the community on various organizations; most notably he is the co-founder of the Tour de Lumsden, a 58km bike race, raising funds for Regina Palliative Care Inc. Jardin obtained his Bachelor of Management & Organizational Specializing in Finance from University of Western Ontario and earned his Chartered Alternative Investment Analyst (CAIA) designation in 2008 and the CFA Charter in 2010.

Chris Chernecki, CFA, Vice President

Chris is Director of Client Service for Greystone Managed Investments. Prior to Chris’ career at Greystone he worked in the commercial finance industry for the Business Development Bank of Canada and GE Capital. He currently serves as Secretary–Treasurer for the CFA Society of Saskatchewan. Chris has a Bachelor of Commerce Hons. from the University of Manitoba and is a CFA charterholder.

Ryan Thompson, CFA, Secretary-Treasurer

Ryan is an Investment Analyst at Lex Capital Management Inc. (Lex Capital), an energy-based private equity firm. In that role, Ryan is responsible for the due diligence, underwriting and monitoring of private and public investments. Prior to joining Lex Capital, Ryan was a Senior Analyst at the Ross Smith Energy Group in Calgary, a boutique independent oil and gas research shop. Ryan obtained his CFA Charter in 2007 and has earned a Bachelor of Administration from the University of Regina.
The CFA Society of Saskatchewan was established as a Chapter of the Winnipeg Society of Financial Analysts in 1987, and was admitted as an independent member society of CFA Institute in February 2000. The Society has grown to over 140 members consisting of portfolio managers, security analysts, investment advisors, and other financial professionals.

Our society is an association of local investment professionals. Consisting of portfolio managers, security analysts, investment advisors, and other financial professionals, we promote ethical and professional standards within the investment industry, encourage professional development through the CFA Program and continuing education, facilitate the exchange of information and opinions among people within the local investment community and beyond, and work to further the public’s understanding of the CFA designation and investment industry. As one of CFA Institute member societies, our society connects members to a global network of investment professionals.

The goals of the society are:
- To provide a professional society for financial analysts in Saskatchewan that facilitates interaction among the profession;
- To promote members’ professional development through educational efforts;
- To promote high ethical standards and investment management professionalism; and,
- To represent the interests of its members and the investment management profession in Saskatchewan.

Zhou Zhang, CFA, Education Chair

Dr. Zhou Zhang is the Associate Professor and Viterra Faculty Fellow in Finance at the Paul J. Hill School of Business, University of Regina. He received his Ph.D. in Finance from the University of Manitoba. He holds the CFA designation and currently serves as the Education Chair and Board of Directors for the CFA Society of Saskatchewan. He also sits on the Investment Committee and is a member of the board for UR Investing program. His research interest is primarily in capital structure, capital raising and the impact of regulatory changes on global capital markets. He has published papers in the Journal of Corporate Finance and Financial Review.

René Benoit, CFA, Membership Chair

René is a Senior Investment Manager at PFM Capital Inc. where he is responsible for originating, due diligence, underwriting and managing private debt and equity investments. Prior to joining PFM, he worked in the Saskatchewan Credit Union system, including Concentra Financial in the Corporate Finance area. René obtained a Bachelor of Administration degree from the University of Regina and also holds the Chartered Financial Analyst (CFA) designation.

Robert Davis, Director

Robert is a Capital Markets Analyst in the Treasury division of Farm Credit Canada. In that role, Robert is responsible for the management and execution of short-term and long-term funding, investment and hedging strategies. Prior to this role, Robert was responsible for financial modeling and post transactional analysis at Farm Credit Canada. He currently serves as the Treasurer on the Association for Financial Professionals of Canada – Regina Board. Robert obtained a Bachelor of Administration from the University of Regina and is a candidate in the CFA program.

C.A. Hatlelid, CFA, Director

C.A. Hatlelid is a Vice-President with Credit Union Deposit Guarantee Corporation. He is responsible for providing executive leadership and strategic direction for regulatory policy, Standards of Sound Business Practice, and preventive initiatives to instill confidence and enhance stability of Saskatchewan credit unions. Prior to joining Credit Union Deposit Guarantee Corporation, he held various positions with Farm Credit Canada and Crown Investments Corporation of Saskatchewan. In the past, C.A. has also held board position for the CFA Society of Saskatchewan.

P.O. Box 20009 - Cornwall RPO- Regina – Saskatchewan - S4P 4J7 - CANADA
E-mail: info@sask.cfasociety.org  Website: www.cfasask.ca
Saskatchewan. C.A. has a Bachelor of Administration degree from the University of Regina and holds the designations of Chartered Financial Analyst, Certified Management Accountant and Financial Risk Manager.

**Gavin Preston, CFA, Director**

Gavin Preston is an Investment Analyst at Westcap Mgt. Ltd. He is responsible for financial analysis, industry research, due diligence activities, and portfolio monitoring of public and private investments. He joined the Westcap team in late 2011 after working for a number of years at Mawer Investment Management Ltd. in Calgary. Gavin was previously on the Board of Directors of the Calgary CFA Society and was President and Treasurer of Connections Counselling. He received the Chartered Financial Analyst (CFA) designation in 2008 and a Bachelor of Science degree from the University of Calgary in 2004.

**Heather Greenman, CFA, Past President**

Heather Greenman is a Portfolio Manager, Canadian Equities at Greystone Managed Investments Inc. With 10 years’ experience in financial markets, Heather oversees sector coverage of Energy, Pipelines and Utilities for Greystone’s Canadian Equity Portfolios. She is an active member of the community, most notably in her involvement with the Canadian Arthritis Society. Heather has served as a member of the Board for 4 years, covering positions including Treasurer, Vice President and President. She has also been active in her role as Chair of Regina’s Annual CFA Society of Saskatchewan Forecast Dinner. Heather obtained her bachelor of Administration degree from the University of Regina and also holds the Chartered Financial Analyst (CFA) Designation.

**Lydia Mohoric, Administrator**

Lydia is the Administrator and bookkeeper for CFA Society of Saskatchewan. She is also the Events Coordinator for the Edmonton CFA Society. Prior to working for CFASS in 2009, she was the Administrator for CFA Winnipeg from 2006 to 2011. She has over 15 years experience in the financial services industry focusing in private wealth and compliance. Lydia holds a Bachelors of Arts degree from the University of Manitoba.

---

**Upcoming events:**

**December 5, 2012**

**Holiday reception and CFA Charter Awards – CRAVE Kitchen and Wine Bar, Regina, SK**