

CFA Society Atlantic Canada Newsletter - January 2016



The CFA Society Atlantic Canada promotes ethical and professional standards within the investment industry, encourages professional development through the CFA Program, and facilitates the open exchange of information and opinions.

President's Report and Mark Your Calendar!	1
2015 Charter Award Ceremony	2
Board of Directors & Contact Info	3

PRESIDENT'S REPORT:

Members and Candidates:

On behalf of the CFA Society Atlantic Canada Board, I would like to wish all of you a healthy and prosperous 2016!

Since the publishing of our last newsletter, our society held two luncheon events in October. Featured guests included Mike Veinot, BMO Global Asset Management (Topic: Enhancing your internet presence using LinkedIn) and Timothy Lane, Deputy Governor, Bank of Canada (Topic: Inflation Targeting – the long and short of it). Although both speakers addressed two different and distinct topics, both sessions garnered a great deal of interest from the attendees. These sessions were followed by our annual Charter Recognition event held on November 24th. The society was proud to have Beth Hamilton-Keen, Chair of the CFA Institute Board of Governors deliver the keynote address and present charters to our new charterholders in Atlantic Canada. Congratulations to all twelve new charterholders!

As we embark on a new calendar year, our society board has been busy setting objectives for the coming months and year(s). The board conducted a member survey in the fall, which provided us the opportunity to hear from all of you. This enables the board to seek ideas to better serve our members and further enhance member value. The survey served as a primary tool for our board's strategic planning session recently held in December. These planning sessions are typically held every three years, allowing the board to revisit/refine the society Mission Statement and set objectives for the upcoming three years. As part of this process, the primary objectives the board will be focusing on over the coming months and year include: 1) Brand Awareness, 2) Education – Candidates & Students, 3) Member Engagement and 4) Program.

Looking ahead at 2016, our board, in keeping with the theme of our society objectives, has been well underway in planning events for this year. Please see the "Mark Your Calendar" section below.

I encourage all of you to join us at these events. On behalf of the board, we appreciate your continued support and look forward to seeing you at future events.

Regards,
Andrea Perry, CFA

Mark Your Calendar!

January 21 - Society Member Social

February 4 - Luncheon Session
Guest Speaker: Craig Lazzara, CFA
S&P Dow Jones Indices

February 11 - General Meeting

March 4 & 5 - Valuation Conference and University Research Challenge

May 18 - Annual Forecast Dinner
Headline Speaker & Event Invitation Coming Soon!



**ON BEHALF OF THE BOARD OF CFA SOCIETY ATLANTIC CANADA,
CONGRATULATIONS TO THE 2015 CHARTER RECIPIENTS!**



Front Row: Jie Jiang, CFA; Mara Haddad, CFA; Jing Li CFA; Nathan Campbell, CFA

Back Row: Guest Speaker from CFA Institute Board of Governors Beth Hamilton-Keen, CFA; Andrew Malloy, CFA; Shawn Martin, CFA; Adrian Saturley, CFA; Society President Andrea Perry, CFA

2015 New Charterholders

(includes Charters awarded after the 2014 Ceremony)

- Nathan Campbell, CFA**
- Mara Haddad, CFA**
- Larry Hazel, CFA**
- Jie Jiang, CFA**
- Jing Li, CFA**
- Shawn Martin, CFA**
- Andrew Malloy, CFA**
- Tristan McBride, CFA**
- Megan McGuire, CFA**
- Jeffrey Oland, CFA**
- Adrian Saturley, CFA**
- Jamie Smith, CFA**



**CFA Society
Atlantic Canada**

**2015 - 2016
CFA Society Atlantic Canada
Board of Directors**

PRESIDENT

Andrea Perry, CFA

PAST PRESIDENT

Chad King, CFA

VICE PRESIDENT

Tyrone Saunders, CFA

TREASURER

Brent Mullins, CFA

SECRETARY

Rob Weatherston, CFA

PROGRAM CO-CHAIR

Jennifer Sanford, CFA

PROGRAM CO-CHAIR

Jonathan Spinney, CFA

MEMBERSHIP CHAIR

Rob Weatherston, CFA

EDUCATION

Rick Nason, CFA

RESEARCH CHALLENGE

Joel Muisse, CFA

TECHNOLOGY

Alexander Longmire, CFA

ADVOCACY

Ross Hallett, CFA

DIRECTOR AT LARGE

David Desjardins, CFA

Megan Murphy, CFA

Peter Syroid, CFA

CONTACT US —

PHONE: 902-832-2827

EMAIL: cfaatlantic@cfaatlantic.com

WEBSITE: www.cfaatlantic.com



**CFA Society
Atlantic Canada**