

**CFA Societies Canada
Managing Director – Job Description**

Job Summary

CFA Societies Canada (the “Society”), a not-for-profit association located in Toronto, Ontario, is looking for a dynamic, energetic and entrepreneur-minded Managing Director to build brand awareness of the CFA designation and to advocate for the highest standards of integrity and ethics for the ultimate benefit of Canadian investors.

The Managing Director (“MD”) is responsible for leading teams of volunteers and a small staff to serve the 12 Canadian CFA Societies and their members. The MD will provide strategic leadership and operational oversight for the Society, manage volunteer committees, and represent CFA charterholders in communications with policy makers, media, and industry groups. The MD will support policy formation and advocacy to Canadian policy makers regarding financial industry regulation, development of relevant research & thought leadership, promotion of professional standards, and outreach to government and industry related to building financial market integrity in Canada. The MD will support national projects related to the investment management business and of interest to CFA charterholders across Canada. The MD reports directly to Board of Directors for the Society and collaborates with the staff at CFA Institute and local Canadian Societies.

ResponsibilitiesExecutive & Operations

- Provide strategic leadership and operational oversight for the Society including direct supervision of other staff and volunteers.
- Accountable for the development and implementation of strategy and the annual budget of \$600,000-700,000 for Board approval.
- Coordinate volunteer activities for standing committees and ad hoc work groups including the Canadian Advocacy Council (“CAC”) and Canadian Investment Performance Council (“CIPC”).
- Organize meetings of and agendas for the Board of Directors and subcommittees.
- Report regularly on key performance indicators to the Board of Directors and Executive Committee.
- Travel within Canada to provincial policy makers, society meetings, and industry events with occasional international travel in collaboration with local Canadian Societies, CAC and CFA Institute.

Advocacy

- Serve as the spokesperson and policy advocate for the Society at meetings and events with Canadian policy makers, industry groups, media, employers, and member societies.
- Direct the capital markets policy, financial reporting policy, investment performance policy, and regulatory strategy of the Society, leading the volunteer committees and liaising with CFA Institute staff as appropriate.
- Promote the adoption of CFA Institute codes and standards, the value of the CFA charter, the CIPM designation, and the professionalism of CFA charterholders and CIPM designees.
- Monitor and analyze policy developments including Canadian legislative, regulatory, and administrative issues.
- Support the identification and preparation of policy positions on current initiatives in coordination with volunteer committees and consultants, including: conducting and

managing research projects, oversight of consultation responses and comment letters, and oversight of writing articles on current policy initiatives.

- Develop thought leadership ideas including conception, planning, realization, and control of related research projects. In collaboration with CAC and CIPC communicate policy positions and projects to relevant internal and external stakeholders.
- Maintain and extend the Society's external network of policy contacts, including associations and stakeholders from the Canadian financial, regulatory, political and public sphere in consultation with local Societies.

Requirements

- Minimum 10 years of professional experience in the investment management industry either as a practitioner, a policy specialist, or journalist.
- Minimum 5 years of leadership experience, managing an organization or significant segment thereof – including strategic planning, budgeting, and implementation of work plans.
- University degree, ideally in business administration, economics, finance, politics, or law.
- Excellent understanding of the Canadian financial industry and regulatory structures, as well as Canadian politics and the political system.
- Experience with regulatory and legislative institutions in Canada is strongly preferred.
- CFA charter is required.
- CIPM designation would be an asset.
- Previous experience with a local CFA Society as volunteer or Board Member would be an asset.
- Small Business experience would be an asset.
- Ability to develop and deliver effective presentations to senior industry leaders and stakeholders.
- Entrepreneurial, hands on attitude - Must demonstrate good judgment and mature business skills.
- Strong verbal & written communication skills combined with strong project management experience.
- Bilingual is strongly preferred - Excellent English and French language skills, both verbally and in writing.
- Demonstrate outstanding stewardship and relationship building/management skills.
- Excellent interpersonal skills including a professional and diplomatic demeanor.
- This position is based in Toronto and will require travel up to 10% of the time.

Apply here:

<https://careers.cfainstitute.org/job/8958858/managing-director/>