

CAREERS IN FINANCE

A WORLD OF

DIFFERENCE

POSSIBILITY

OPPORTUNITY

DIVERSITY

CHANGE



CFA Society
Winnipeg

A WORLD OF DIFFERENCE

We are living in an era of globalization and technology where change is constant, access to information—just a click away—and the impact of decisions made in the political, economic and financial markets reverberate worldwide. Whether around the corner, the country or the globe, those who choose a career in Finance use their analytical skills, natural curiosity and love of math to evaluate information and risk and explore opportunities that can make a world of difference.

Investment management is the professional management of stocks, bonds and other assets to create wealth for clients. Finance is the field that studies these investments and the impact of different economic conditions over time. A career in finance is a combination of art and science: the art of behavioral finance (the emotion driving investors to do what they do), mixed with the science of numerical analysis.

Though many of the skills are shared, a career in **Finance** differs from **Accounting**.

FINANCE

Analyze Financial Statements

Build Economic Models

Investment Decisions

Risk & Uncertainty

ACCOUNTING

Precision & Certainty

Investment Measurement

Budget Planning

Prepare Financial Statements

A WORLD OF POSSIBILITY

Are you an analytical thinker and natural problem solver? A math whiz that loves numbers and has endless curiosity? How about a communicator and self-motivated, lifelong learner or a global thinker with an interest in business and economics?

If you answered yes you might want to consider pursuing a degree in finance, business, math or economics. These programs can put you on the path to a variety of careers in the field of Finance, and on the road to earning the CFA designation, the Gold Standard in the industry.

“I quickly realized that finance was the perfect combination of the three things I was passionate about; a business-focused career, constantly changing mathematical puzzles, and a problem that needed to be solved.”

Katie F – CFA Charterholder since 2015.
Senior Risk Analyst,
IBM Canada

A WORLD OF OPPORTUNITY

There's a world of career opportunities for those with a degree in finance, math or economics, combined with a CFA designation. The outlook for these graduates, especially women, has never been greater.

“Finance is ever-changing with new areas of focus; 10-15 years ago, there were derivatives, today there are crypto currencies. The regulatory landscape has also greatly increased.”

Shaila E. - CFA Charterholder since 2006.
Assistant Vice-President, Investment Compliance,
Great-West Life Assurance Co.

Positions in finance exist in banks, insurance companies, investment management companies, governments, pension plans, corporate treasury and small businesses. The jobs available to a graduate with a finance degree are as diverse as the people who pursue this career path. You can apply the knowledge you gain in school to a multitude of jobs in a wealth of different fields.

“I focus on building consultative relationships with clients by understanding their investment needs, communicating our investment strategies and performance results and proactively assisting them with relevant solutions.”

Elizabeth M. - CFA Charterholder since 1984.
Vice-President, Institutional Relationships
Greystone Managed Investments Inc.

“I analyze international equities by looking at a range of factors. I look at company fundamentals, valuations, economics and politics to make an investment recommendation. I travel globally attending conferences, meeting companies and doing site visits.”

Taryn P. - CFA Charterholder since 2017.
Investment Analyst,
Manitoba Civil Service Superannuation Board

“I am lead portfolio manager for income-focused mandates and real return bond mandates. My responsibilities include fundamental and technical analysis, strategy formulation, security selection and trading.”

Alexa R. - CFA Charterholder since 2011.
Associate Manager, Fixed Income,
GLC Asset Management Group Ltd.



A WORLD OF DIVERSITY

Women comprise half of the global population but are highly underrepresented in the investment profession. Bringing greater gender diversity to the finance industry is good for business. Statistics show that diversity delivers results. Businesses that employ women have a 41% higher return than organizations where women are absent**. Creating diverse, mixed-gender teams brings together a greater variety of experience, knowledge, perspective, values and ways of thinking in approaching challenges and are better positioned to move forward in a rapidly changing global business environment.

**Asset & Wealth Management Revolution: Embracing Exponential Change, PwC, 2017



A WORLD OF CHANGE

Now—more than ever—finance needs more women. Be a part of the change. Find out how to start your journey to a career that can transform the world around you.

“Take the opportunity to enroll in many different courses to find out what interests you. You might be surprised at the outcome. You never know what course may spark an interest you didn’t know you had!”

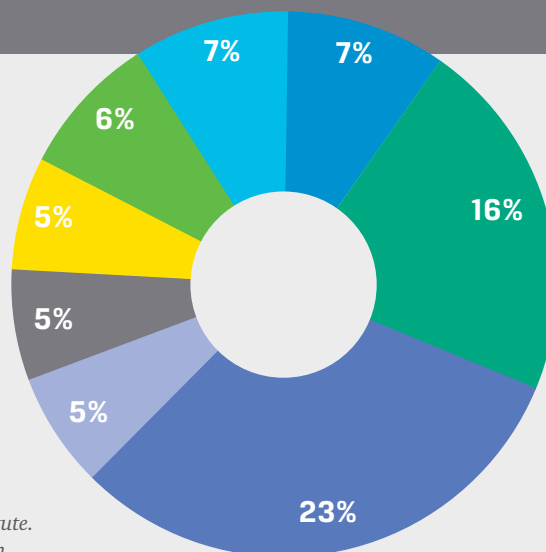
Debbie R. – CFA Charterholder since 2000.
Vice President, Investment Management
Quadrant Asset Management



What jobs does it prepare you for?

TOP CFA CHARTERHOLDER OCCUPATIONS

- Portfolio Manager **23%**
- Research Analyst **16%**
- Chief-Level Executive **7%**
- Consultant **7%**
- Risk Manager **6%**
- Financial Advisor **5%**
- Corporate Financial Analyst **5%**
- Relationship Manager **5%**



**As of January 2016, Job function is self-reported and not verified by CFA Institute. The 26% not displayed are in job functions with less than 5% of members each.*

“A career in finance is a path more women should consider. It’s a dynamic, exciting and challenging career where the feedback is often immediate and the opportunity to grow and learn immense.

You’ll need strong analytical skills, exceptional inter-personal talents including the ability to sell an idea to your team leader and teammates and/or the client. As well, it helps to be a self-starter, have the ability to handle stress and have a good sense of humour.”

Patricia N. – CFA Charterholder since 1989.
Senior Vice President, Equities,
GLC Asset Management Group Ltd.



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