



**CFA Society
Toronto**

SETTING A HIGHER STANDARD FOR THE
TORONTO INVESTMENT COMMUNITY

MEDIA

CONTACT

DIRECTORY
2016/17

CFA SOCIETY TORONTO MEDIA CONTACT DIRECTORY, 2016/17

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CFA Society Toronto

ABOUT CFA SOCIETY TORONTO

CFA Society Toronto supports the professional and business development of more than 9,000 CFA charterholders in Toronto, making it the second largest CFA Society in the world. It provides members with a local perspective on a global designation, including: educational programs, sponsored events, job postings, quarterly newsletters, a comprehensive affinity program, and networking opportunities. A not-for-profit organization, CFA Society Toronto is a member society of CFA Institute, the global body that administers the Chartered Financial Analyst® curriculum and sets voluntary, ethics-based performance-reporting standards for the investment industry. CFA Society Toronto's members are leaders in ethics in the financial community. For more information, please refer to www.cfatoronto.ca.

WHAT IS THE MEDIA CONTACT DIRECTORY?

The Media Contact Directory is a comprehensive guide to our members that gives you direct access to investment industry experts within the Greater Toronto Area and beyond.

The directory consists of members who have had their CFA charter for more than five years and have areas of expertise that they are willing to share by accepting phone calls or taking part in media interviews. There are more than 30 investment-related areas showcased in the directory.

Please note that members will speak on their areas of expertise and on behalf of their companies. If you would like to speak with someone who represents CFA Society Toronto, please contact Jonathan Mai at media@cfatoronto.ca.

The directory is released in print format on an annual basis and is updated quarterly on the CFA Society Toronto website.

HOW DO I USE THE MEDIA CONTACT DIRECTORY?

The directory is divided into areas of expertise, and members are listed alphabetically by last name for ease of use. If you are looking for someone who has knowledge in a specific area, you can use the table of contents located on page 3. We have also included a section for members who have expressed an interest in writing articles, located on page 15.

Many of our members have multiple designations or degrees. There is a glossary of acronyms on page 17 for easy reference.

FINANCIAL JOURNALISM AWARD

CFA Society Toronto created a set of journalist awards in 2013, based on the model set forward by CFA Society UK. This award recognizes the contributions of different Ontario and Canadian publications and journalists towards advancement of investor education, best practice, and the promotion of ethics and high professional standards within the financial community.

This award identifies and rewards publications and journalists whose work helps consumers gain a better understanding of the investment profession. In order to win, submissions need to be explanatory, relevant, easy to read, and backed up by data and facts.

Three awards will be presented at the annual CFA Society Toronto Financial Journalism Awards. Award categories include Publication of the Year, Journalist of the Year, and the article that embodies the Spirit of The Future of Finance. For further details, email [**media@cfatoronto.ca**](mailto:media@cfatoronto.ca)

FEEDBACK

If you have any suggestions, please forward your feedback to [**media@cfatoronto.ca**](mailto:media@cfatoronto.ca).

CORPORATE BONDS, HIGH-YIELD SECURITIES

Mark J. Carpani, CFA	10
Nicholas A. Flemming, MSc, CPA, FMA, CFA	11
Paul Gardner, CFA	11
Greig McKenzie, BBA, CFA	13
Marcus Turner, FRM, CFA	14

DERIVATIVES, HEDGE FUNDS

Craig Geoffrey, CIM, MBA, CFA	11
Christopher Guthrie, CFA	11

ECONOMICS, DEPARTMENT OF LABOUR, STATISTICS, ETC.

James Philip Catty, CPA, CA, CBV, CPA, ABV,CVA, CFE, CFA	10
Aleem Israel, CFA	12
Michael Sprung, MBA, FLMI, CFA	14

EQUITIES, CORPORATE EARNINGS ANALYTICS

Talbot Babineau, CFA	10
Nicholas A. Flemming, MSc, CPA, FMA, CFA	11
Paul Gardner, CFA	11
Craig Geoffrey, CIM, MBA, CFA	11
Bruce Grantier, CAIA, ICD.C., CFA	11
Arthur Heinmaa, CFA	12
Aleem Israel, CFA	12
Norman Levine, CFA	12
Jim Marrone, CFA	12
Greig McKenzie, BBA, CFA	13
Irwin A. Michael, BComm, MBA, CFA	13
Marina Pomerantz, CA, CPA, CFA	13
Jenifer Rush, CFA	13
Ron Schwarz, CFA	14
Michael Sprung, MBA, FLMI, CFA	14

ETHICAL ISSUES

Frederick M. Pinto, CFA	13
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GLOBAL EVENTS, OVERSEAS MARKETS

Talbot Babineau, CFA	10
James Philip Catty, CPA, CA, CBV, CPA, ABV,CVA, CFE, CFA	10
Arthur Heinmaa, CFA	12

INITIAL PUBLIC OFFERINGS

Iain Butler, CFA	10
James Philip Catty, CPA, CA, CBV, CPA, ABV,CVA, CFE, CFA	10

MUTUAL FUNDS

Nicholas A. Flemming, MSc, CPA, FMA, CFA	11
Irwin A. Michael, BComm, MBA, CFA	13
Jenifer Rush, CFA	13

PERSONAL FINANCIAL PLANNING

Nicholas A. Flemming, MSc, CPA, FMA, CFA	11
Janine Guenther, CMT, CFA	11
Frederick M. Pinto, CFA	13
Barbara Stewart, CFA	14
Thomas J. Trainor, MBA, CPA, CA, CLU, CFP, CFA	14

PORTFOLIO MANAGEMENT, INVESTMENT STRATEGIES

Talbot Babineau, CFA	10
Steven Belchetz, CFA	10
Iain Butler, CFA	10
Mark J. Carpani, CFA	10
Nicholas A. Flemming, MSc, CPA, FMA, CFA	11
Paul Gardner, CFA	11
Craig Geoffrey, CIM, MBA, CFA	11
Janine Guenther, CMT, CFA	11
Christopher Guthrie, CFA	11
Arthur Heinmaa, CFA	12
Aleem Israel, CFA	12
Norman Levine, CFA	12
Harry Marmer, BBA, MBA, CFA	12
Greig McKenzie, BBA, CFA	13
Irwin A. Michael, BComm, MBA, CFA	13
Ron Schwarz, CFA	14
Michael Sprung, MBA, FLMI, CFA	14
Barbara Stewart, CFA	14
Thomas J. Trainor, MBA, CPA, CA, CLU, CFP, CFA	14

REAL ESTATE, REAL ESTATE INVESTMENT TRUSTS

Paul Gardner, CFA	11
William E. Hewitt, CFA	12
Catherine Ann Marshall, CFA	12

TAX

Michael Sprung, MBA, FLMI, CFA	14
Thomas J. Trainor, MBA, CPA, CA, CLU, CFP, CFA	14

TAX-DEFERRED SAVINGS PLANS

Michael Sprung, MBA, FLMI, CFA	14
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TECHNOLOGY

Aleem Israel, CFA	12
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TREASURY BOND MARKETS

Mark J. Carpani, CFA	10
Arthur Heinmaa, CFA	12

INDUSTRY SPECIALTIES

ACADEMIC

Talbot Babineau, CFA	10
Steven Balaban, CFA	10
Craig Geoffrey, CIM, MBA, CFA	11
Arthur Heinmaa, CFA	12
Jim Marrone, CFA	12

ACCOUNTING

James Philip Catty, CPA, CA, CBV, CPA, ABV, CVA, CFE, CFA	10
Janine Guenther, CMT, CFA	11
Pamela Steer, CPA, CA, CFA	14

ALTERNATIVE INVESTMENTS

Steven Balaban, CFA	10
Craig Geoffrey, CIM, MBA, CFA	11
William E. Hewitt, CFA	12
Aleem Israel, CFA	12
Catherine Ann Marshall, CFA	12
Greig McKenzie, BBA, CFA	13
Marcus Turner, FRM, CFA	14

ASSET CLASSES

Steven Balaban, CFA	10
Mark J. Carpani, CFA	10
Nicholas A. Flemming, MSc, CPA, FMA, CFA	11
Bruce Grantier, CAIA, ICD.C., CFA	11
Christopher Guthrie, CFA	11
Harry Marmer, BBA, MBA, CFA	12
Greig McKenzie, BBA, CFA	13
Barbara Stewart, CFA	14

ENERGY / INDUSTRIALS / CHEMICALS

Iain Butler, CFA	10
Bruce Grantier, CAIA, ICD.C., CFA	11
William E. Hewitt, CFA	12

EXCHANGE-TRADED FUNDS

Nicholas A. Flemming, MSc, CPA, FMA, CFA	11
Christopher Guthrie, CFA	11
Thomas J. Trainor, MBA, CPA, CA, CLU, CFP, CFA	14

GENDER DIVERSITY

Alison Crosthwait, RP, ACC, CFA	10
Barbara Stewart, CFA	14

INCOME TRUSTS / INCOME FUNDS

William E. Hewitt, CFA	12
Greig McKenzie, BBA, CFA	13

INFRASTRUCTURE

James Philip Catty, CPA, CA, CBV, CPA, ABV, CVA, CFE, CFA	10
Catherine Ann Marshall, CFA	12
Marcus Turner, FRM, CFA	14

INTERNATIONAL ISSUES

Catherine Ann Marshall, CFA	12
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INDUSTRY SPECIALTIES

NATURAL RESOURCES

Iain Butler, CFA 10

OIL AND GAS

Bruce Grantier, CAIA, ICD.C., CFA 11

PENSIONS

Bruce Grantier, CAIA, ICD.C., CFA 11

Christopher Guthrie, CFA 11

William E. Hewitt, CFA 12

Harry Marmer, BBA, MBA, CFA 12

Pamela Steer, CPA, CA, CFA 14

Marcus Turner, FRM, CFA 14

TECHNICAL

Janine Guenther, CMT, CFA 11

INDUSTRY SPECIALTIES, OTHER

CANADIAN CURRENCY,
ENDOWMENT AND FOUNDATIONS

Marcus Turner, FRM, CFA 14

CAREER DEVELOPMENT, LEADERSHIP

Mark J. Carpani, CFA 10

CONSUMER CONFIDENCE

Aleem Israel, CFA 12

CONSUMER DISCRETIONARY
& STAPLES

Paul Gardner, CFA 11

FOREIGN EXCHANGE FX

Camilla Sutton, CMT, CFA 14

MERGERS & ACQUISITIONS

David Fidler, CFA 11

PRIVATE CLIENT
– INVESTMENT FUNDS
FOR RETAIL INVESTORS

Frederick M. Pinto, CFA 13

PRIVATE DEBT, PRIVATE EQUITY,
AGRICULTURE, TIMBER

Catherine Ann Marshall, CFA 12

Thomas J. Trainor, MBA,
CPA, CA, CLU, CFP, CFA 14

PSYCHOLOGY – AS IT RELATES
TO CAPITAL MARKETS

Alison Crosthwait, RP, ACC, CFA 10

RISK MANAGEMENT

Talbot Babineau, CFA 10

SECURITY SELECTION PROCESS

Talbot Babineau, CFA 10

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Talbot Babineau, CFA 10

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Marcus Turner, FRM, CFA

Area: CB, IS

Job Title: Investment Principal

Morneau Shepell

mturner@morneaushepell.com

Phone: 416.500.6062

MEMBERS WILLING TO WRITE ARTICLES

Following is a list of members who may be willing to write articles about their industry specialties:

Steven Balaban, CFA	10	Norman Levine, CFA	12
Mark J. Carpani, CFA	10	Harry Marmer, BBA, MBA, CFA	12
James Philip Catty, CPA, CA, CBV, CPA, ABV, CVA, CFE, CFA	10	Catherine Ann Marshall, CFA	12
Nicholas A. Flemming, MSc, CPA, FMA, CFA	11	Greig McKenzie, BBA, CFA	13
Paul Gardner, CFA	11	Irwin A. Michael, BComm, MBA, CFA	13
Craig Geoffrey, CIM, MBA, CFA	11	Frederick M. Pinto, CFA	13
Bruce Grantier, CAIA, ICD.C, CFA	11	Ron Schwarz, CFA	13
Janine Guenther, CM, CFA	11	Michael Sprung, MBA, FLMI, CFA	13
Christopher Guthrie, CFA	11	Pamela Steer, CPA, CA, CFA	14
Arthur Heinmaa, CFA	12	Barbara Stewart, CFA	14
William E. Hewitt, CFA	12	Marcus Turner, FRM, CFA	14
Aleem Israel, CFA	12		

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Dan Lavallee, CFA

Chair, CFA Society Toronto

dlavallee@cfatoronto.ca

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Anish Chopra, CFA

Past Chair, CFA Society Toronto

anish.chopra@tdam.com

Phone: 416.366.5755

GLOSSARY OF AREAS-OF-EXPERTISE ACRONYMS

CB Corporate bonds, high-yield securities

DER Derivatives, hedge funds

EC Economics, Department of Labour, statistics, etc.

EQ Equities, corporate earnings analytics

ETF Exchange-traded funds

ETH Ethical issues

GD Gender Diversity

GE Global events, overseas markets

IPO Initial public offering

IS Industry specialties

MU Mutual funds

PFP Personal financial planning

PM Portfolio management, investment strategies

RE Real estate, real estate investment trusts

TB Treasury bond markets

TD Tax-deferred savings plans

TECH Technology

TI Tax

GLOSSARY OF PROFESSIONAL AND OTHER DESIGNATION ACRONYMS

ACC	Associate Certified Coach
BA	Bachelor of Arts
BBA	Bachelor of Business Administration
BComm	Bachelor of Commerce
CA	Chartered Accountant
CFA	Chartered Financial Analyst
CFP	Certified Financial Planner
CHFC	Chartered Financial Consultant
CIM	Canadian Institute of Management
CLU	Chartered Life Underwriter
CMA	Certified Management Accountant
CMT	Chartered Market Technician
CPA	Certified Public Accountant
FCIA	Fellow of Canadian Institute of Actuaries
FLMI	Fellow, Life Management Institute
FMA	Financial Management Association
LLB	Law degree
MBA	Master of Business Administration
MSc	Master of Science
RP	Registered Psychotherapist
TEP	Trust and Estate Practitioner



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