

Canada's Investment Industry Faces



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How long have you worked in the industry?

I have been in the investment industry for 22 years. I was hired as an Investment Assistant at Odlum Brown in 1993 and have been here ever since. Over that time, I have seen both the industry and our company evolve considerably. I am proud to be part of that evolution.

Please tell us about any volunteer activities you may be involved in.

I am passionate about children's and women's health issues and coordinate our company's fund raising campaigns for BC Children's Hospital Foundation Jeans Day™, the CURE Foundation's National Denim Day and the CIBC Run for the Cure. I have acted as a mentor for the Executive Mentorship Program at UBC's Sauder School of Business for the last 5 years and recently participated in The Minerva Foundation's Learning to Lead™ mentorship workshop. I also enjoy managing my son's soccer team.

Please tell us a bit about your average day in the office.

No day is average, which is what makes it so interesting. I manage all components of the employee lifecycle for Odlum Brown's Sales Support team, so my day can include aspects of recruitment and selection, orientation and onboarding, employee relations and performance management. I also work on corporate human resources initiatives related to talent acquisition, employee retention, the performance management cycle and compensation planning. There is a lot of diversity in my role, so it can be very challenging and, at the same time, very satisfying.

What drove your interest to work in the investment industry?

My family has deep roots in the investment industry. My father was co-owner of an investment firm before working for the Investment Dealers Association. My mother was a Vice President and Portfolio Manager for a national firm. As one can imagine, dinner conversations were often

about market-related matters. My brothers and cousin are also industry veterans. Joining the investment industry seemed inevitable!

Do you find the work you do satisfying? If yes, why?

My work can be very satisfying. My clients are my colleagues. It is very rewarding to find the right fit with a new team member or help a team member reach their potential. We support team members with their professional development and frequently promote from within, helping them realize their career goals. Having the opportunity to see them grow in a new role and contribute to Odlum Brown's growth and success has been wonderful to experience.

How do you see the industry helping investors and the Canadian economy as a whole?

We help investors avoid financial mistakes, make suitable investment decisions and realize their financial goals. We also work in an industry with strong regulations and where there is much integrity. That integrity creates investor confidence and translates to a stronger marketplace.

Would you recommend a career in the investment industry to a young Canadian considering his/her career options? If yes, why?

Yes, I would – for many different reasons. It is an exciting industry that is constantly changing. You also derive satisfaction from knowing that you are helping others. And there is no limit to what you can learn. You are constantly challenged by having to learn new regulations, educating yourself about the markets and keeping up with economic conditions. It is a dynamic and rewarding experience!