

Canada's Investment Industry Faces



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How long have you worked in the industry?

Just over eight years, since June 2007, straight out of the Sauder School of Business.

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

I have not been as active in our community lately, but this is a great reminder that I should be. In the past, I have been involved with fundraisers for our local Food Bank and Habitat for Humanity.

Please describe an average day for you in the office.

My day begins with browsing the latest headlines and marketing trends during my morning commute. After checking emails and voicemails at the office, I prioritize the day's requests and ongoing projects, which range from providing marketing support to our advisors to implementing branding or digital initiatives. I'm a communicator, connector, and a problem-solver each day, so there is never a dull moment.

What drove your interest to work in the investment industry?

My father taught me how to read stock charts when I was about 7 or 8. First, it began with following a few shares of Disney; then, my allowance became funded by earning dividends from McDonald's, or selling stocks that I had helped pick. Instead of buying toys or video games, I was more interested in buying the companies that created them. Looking back, it was a sneaky way to get me to learn about the world of investing, but it piqued my interest early in life, and my aptitude for business analysis stuck.

When it became time to pursue a career, I wanted to work for an industry with a long shelf-life in Vancouver, which at the time was in financial services, telecommunications, or resources. A wise Marketing Professor of mine once challenged us to work for the best companies in order to learn from the best. He even took the time to photocopy lists for us of the Best Companies to

Work For in BC, so those companies became a starting point during my job search. An opportunity came up at the right place and at the right time, and eight years later, I'm still with Odlum Brown because it is a wonderful workplace that cares about the well-being of its employees and, equally important, the well-being of clients and the greater community.

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

Absolutely! Marketing is my passion—it is the perfect creative outlet for my business-savvy and artistic eye. I am fortunate to be able to work for a company that values my ideas and I am happy to contribute to the well-oiled machine that is our marketing team. From time to time, it is nice to celebrate the fruits of your labour. The best compliment I can receive is when complete strangers recognize Odlum Brown from one of the projects in which I was involved, or when friends and friends of family have heard great things about the Firm or, just having formed a relationship with one of our advisors, they are glad that they switched.

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

It is shocking to see how many people my age do not have a clue about investing, let alone the time to keep their personal finances in order. After the last financial crisis, I do not blame them for being a little gun-shy about seeking investment advice.

The Millennials of today will become the retirees of tomorrow, the Baby Boomers and Gen Xers have already had a hard enough time balancing the burden of supporting their Millennials at home and aging parents; it is for the good of the Canadian economy to have a financially-sound workforce that can rely on something outside of a government-funded pension in retirement. So, it is up to us to regain and retain the trust of Canadian investors and set them up for success for generations to come.

Over the years, the industry has done a great job of raising the bar on transparency and controls that protect investors. It is all about keeping people informed and educated about their financial decisions in the long run. Short-term thinking is what garnered mistrust, but long-term thinking will set the record straight.

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

My hope for anyone looking to begin a career in the investment industry is that they enter it for the right reasons. If you are prepared to focus, work hard and be a humble life-long learner, then the world is your oyster. However, it is not like the movies, and the majority of people do not become rich and famous overnight. It is patience, perseverance, and a genuine love of people that will lead to true success.