

# CWIM LEADER SPOTLIGHT



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**Investment Counsellor**  
**RBC PH&N Investment Counsel**

**CFA Society Edmonton**



## **DESCRIBE YOURSELF USING THREE WORDS.**

Resilient. Determined. Passionate.

## **WHAT IS YOUR CURRENT JOB TITLE / COMPANY AND WHAT DO YOU LIKE THE MOST ABOUT YOUR ROLE?**

I am an Investment Counsellor with RBC PH&N IC. RBC PH&N Investment Counsel is one of Canada's leading boutique investment counselling firms with investment professionals from coast to coast, acting exclusively for high-net worth clients. What I like most about my role is that I work directly with individuals and families; I support them in creating the life and legacy they had envisioned for themselves and their families. I love that I am able to build meaningful relationships with my clients. I continue to be amazed by the depth and fullness of our wealth management experience when together with the Wealth Management Services team, those in-house lawyers, accountants and philanthropic advisors, we explore with our clients what the future can look like.

## **WHAT IS YOUR ROLE WITH YOUR CFA SOCIETY? WHAT HAS BEEN THE MOST REWARDING EXPERIENCE FOR YOU?**

I am a Director for the CFA Society Edmonton and the Co-Chair of the Private Wealth Committee. The Private Wealth Committee is very active in providing content to our members in the Edmonton region.

We are currently planning a panel discussion on fixed income on September 23rd as well as a presentation on persuasion and negotiation by Fotini Iconomopoulos on October 28th. One of the most rewarding experiences volunteering for Society for me was a few years ago when I was involved in the planning of the first Diversity in Finance conference which was hosted by the CFA Society Calgary. We had such a great lineup of speakers. Excellent experience overall.

### **WHAT MOTIVATED YOU TO JOIN / SUPPORT THE COLLABORATIVE WIM INITIATIVE?**

Diversity - supporting and empowering women is something I am passionate about. I am currently the Co-Chair of Edmonton Women in Finance's Post-Secondary Sub-Committee, I mentor female professionals and meet with students regularly to explore with them what a career in finance might look like. Therefore, it seemed like a natural fit: my values are very much aligned with those of the Collaborative WIM Initiative.

### **IF YOU WERE INDEPENDENTLY WEALTHY AND DIDN'T NEED TO WORK, HOW WOULD YOU SPEND YOUR TIME?**

I would spend the majority of my time volunteering for organizations that support women, children or the less fortunate in my community. There is so much I would like to contribute.

## **WHAT IS THE MOST INTERESTING THING YOU'VE READ RECENTLY?**

Man's Search For Meaning by Viktor E. Frankl – "Forces beyond your control can take away everything you possess except one thing, your freedom to choose how you will respond to the situation." – Victor E. Frankl

