



**CFA Society
Toronto**

SETTING A HIGHER STANDARD FOR THE
TORONTO INVESTMENT COMMUNITY

2023/24

MEDIA

CONTACT

DIRECTORY

CFA SOCIETY TORONTO 2018 MEDIA CONTACT DIRECTORY

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CFA Society Toronto

ABOUT CFA SOCIETY TORONTO

CFA Society Toronto supports the professional and business development of over 11,000 CFA® charterholders in Toronto, making it the largest Society of CFA charterholders in the world. The Society provides members and the greater investment community 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 will share their knowledge as

a charterholder, please contact Esther Filer 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 at cfatoronto.ca/news-insights/CFAExpert.

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 19.

Many of our members have multiple designations or degrees. There is a glossary of acronyms on page 20 and 21 for easy reference.

FEEDBACK

If you have any suggestions, please forward your feedback to media@cfatoronto.ca.

CANADIAN RETIREMENT TRENDS

Anish Chopra, CA, CPA, CFA	10
Christopher Guthrie, CFA	11
Ahmed Mekawi, CFP, CFA	12
David Onyett-Jeffries, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13
Barbara Stewart, CBV, CFA	13

CORPORATE BONDS, HIGH-YIELD SECURITIES

Mark Carpani, CFA	10
Anish Chopra, CA, CPA, CFA	10
Paul Gardner, CFA	11
Ahmed Mekawi, CFP, CFA	12

DERIVATIVES, HEDGE FUNDS

Talbot Babineau, CFA	10
Craig Geoffrey, CIM, MBA, CFA	11
Christopher Guthrie, CFA	11

DIVERSITY & INCLUSION

Ahmed Mekawi, CFP, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13
Barbara Stewart, CBV, CFA	13

ECONOMICS, DEPARTMENT OF LABOUR, STATISTICS, ETC.

Anish Chopra, CA, CPA, CFA	10
Craig Geoffrey, CIM, MBA, CFA	11
David Onyett-Jeffries, CFA	12
Michael Sprung, MBA, FLMI, CFA	12

EQUITIES, CORPORATE EARNINGS ANALYTICS

Tarek Aeta, CFA	10
Talbot Babineau, CFA	10
Iain Butler, CFA	10
Anish Chopra, CA, CPA, CFA	10
Paul Gardner, CFA	11
Craig Geoffrey, CIM, MBA, CFA	11
Ron Schwarz, MBA, FLMI, CFA	12
Michael Sprung, MBA, FLMI, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13

ESG INVESTING

Christopher Guthrie, CFA	11
William E. Hewitt, CFA	11
Yufei Man, CAIA, CFA	12
Ahmed Mekawi, CFP, CFA	12
Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA	12
Barbara Stewart, CBV, CFA	13

ETHICAL ISSUES

Janine Guenther, CMT, CFA	11
Christopher Guthrie, CFA	11
Ahmed Mekawi, CFP, CFA	12
Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13

GLOBAL EVENTS, OVERSEAS MARKETS

Talbot Babineau, CFA	10
Steven Belchetz, CFA	10
Anish Chopra, CA, CPA, CFA	10
David Onyett-Jeffries, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13

INITIAL PUBLIC OFFERINGS

Iain Butler, CFA	10
Anish Chopra, CA, CPA, CFA	10

MUTUAL FUNDS

Nicholas Flemming, CFA	11
Yufei Man, CAIA, CFA	12
Ahmed Mekawi, CFP, CFA	12

PERSONAL FINANCIAL PLANNING

Anish Chopra, CA, CPA, CFA	10
Nicholas Flemming, CFA	11
Paul Gardner, CFA	11
Janine Guenther, CMT, CFA	11
Christopher Guthrie, CFA	11
Ahmed Mekawi, CFP, CFA	12
Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA	12
Barbara Stewart, CBV, CFA	13
Thomas J. Trainor, FCA, CFP, CLU, FCPA, MBA, PFS, CFA	13

PORTFOLIO MANAGEMENT, INVESTMENT STRATEGIES

Tarek Aeta, CFA	10
Talbot Babineau, CFA	10
Steven Belchetz, CFA	10
Iain Butler, CFA	10
Mark Carpani, CFA	10
Anish Chopra, CA, CPA, CFA	10
Nicholas Flemming, CFA	11
Paul Gardner, CFA	11
Craig Geoffrey, CIM, MBA, CFA	11
Janine Guenther, CMT, CFA	11
Christopher Guthrie, CFA	11
Yufei Man, CAIA, CFA	12
Harry Marmer, CAIA, CFA	12
Ahmed Mekawi, CFP, CFA	12
Ron Schwarz, MBA, FLMI, CFA	12
Michael Sprung, MBA, FLMI, CFA	12
Barbara Stewart, CBV, CFA	13

REAL ESTATE, REAL ESTATE INVESTMENT TRUSTS

Paul Gardner, CFA	11
William E. Hewitt, CFA	11

TAX

Anish Chopra, CA, CPA, CFA	10
Ahmed Mekawi, CFP, CFA	12
Michael Sprung, MBA, FLMI, CFA	12
Thomas J. Trainor, FCA, CFP, CLU, FCPA, MBA, PFS, CF	13

TAX-DEFERRED SAVINGS PLANS

Anish Chopra, CA, CPA, CFA	10
Ahmed Mekawi, CFP, CFA	12
Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA	12
Michael Sprung, MBA, FLMI, CFA	12
Thomas J. Trainor, FCA, CFP, CLU, FCPA, MBA, PFS, CF	13

TECHNOLOGY

Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA	12
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TREASURY BOND MARKETS

Mark Carpani, CFA	10
Anish Chopra, CA, CPA, CFA	10
Paul Gardner, CFA	11

INDUSTRY SPECIALTIES

ACADEMIC

Talbot Babineau, CFA	10
Steven Balaban, CFA	10
Craig Geoffrey, CIM, MBA, CFA	11

ACCOUNTING

Anish Chopra, CA, CPA, CFA	10
Pamela Steer, CBV, FCA, FCPA, CFA	13

ALTERNATIVE DATA

Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA	12
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ALTERNATIVE INVESTMENTS

Steven Balaban, CFA	10
Steven Belchetz, CFA	10
Craig Geoffrey, CIM, MBA, CFA	11
William E. Hewitt, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13

ASSET CLASSES

Talbot Babineau, CFA	10
Steven Balaban, CFA	10
Steven Belchetz, CFA	10
Anish Chopra, CA, CPA, CFA	10
Nicholas Flemming, CFA	11
Christopher Guthrie, CFA	11
Norman Levine, CFA	11
Yufei Man, CAIA, CFA	12
Harry Marmer, CAIA, CFA	12
Ahmed Mekawi, CFP, CFA	12
David Onyett-Jeffries, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13

CONSUMER CONFIDENCE DISCRETIONARY & STAPLES

Anish Chopra, CA, CPA, CFA	10
Paul Gardner, CFA	11
David Onyett-Jeffries, CFA	12

ENERGY / INDUSTRIALS / CHEMICALS

Iain Butler, CFA	10
Anish Chopra, CA, CPA, CFA	10
William E. Hewitt, CFA	11

EXCHANGE-TRADED FUNDS

Tarek Aeta, CFA	10
Nicholas Flemming, CFA	11
Janine Guenther, CMT, CFA	11
Christopher Guthrie, CFA	11
Yufei Man, CAIA, CFA	12
Ahmed Mekawi, CFP, CFA	12
Thomas J. Trainor, FCA, CFP, CLU, FCPA, MBA, PFS, CFA	13

INCOME TRUSTS / INCOME FUNDS

Anish Chopra, CA, CPA, CFA	10
William E. Hewitt, CFA	11

INFRASTRUCTURE

Anish Chopra, CA, CPA, CFA	10
Talbot Babineau, CFA	10
William E. Hewitt, CFA	12

INTERNATIONAL ISSUES

Anish Chopra, CA, CPA, CFA	10
Talbot Babineau, CFA	10
Pamela Steer, CBV, FCA, FCPA, CFA	13

NATURAL RESOURCES

Iain Butler, CFA	10
Anish Chopra, CA, CPA, CFA	10

PENSIONS

Christopher Guthrie, CFA	11
William E. Hewitt, CFA	11
Michael Sprung, MBA, FLMI, CFA	12
Pamela Steer, CBV, FCA, FCPA, CFA	13

INDUSTRY SPECIALTIES

INDUSTRY SPECIALTIES, OTHER

FinTECH

Jason Pereira, CFA, CFP (Can, US),
FP, MBA, RFP 12

HOUSING

Anish Chopra, CA, CPA, CFA 10

HEALTH CARE

Tarek Aeta, CFA 10

RISK MANAGEMENT

Talbot Babineau, CFA 10

SECURITY SELECTION PROCESS

Talbot Babineau, CFA 10

STOCK PICKING, VALUE INVESTING

Talbot Babineau, CFA 10

Tarek Aeta, CFA

Areas: EQ, ETF, PM

Job Title: Vice President

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Talbot Babineau, CFA

Areas: AS, EQ, PM

Job Title: President and CEO

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Areas: AI, AS, IS, PM

Job Title: Chief Investment Officer

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Phone: 416-939-4975

Steven Belchetz, CFA

Areas: AI, AS, GE, PM

Job Senior Vice President

CWB Wealth Management

sbelchetz@teic.com

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Iain Butler, FRM, CFA

Areas: EQ

Job Title: Chief Investment Advisor

The Motley Fool Canada

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Mark Carpani, FP Canada Fellow, CFA

Areas: CB, PM, TB

Job Title: Senior Vice President

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Anish Chopra, CA, CPA, CFA

Areas: AC, AS, CB, EQ, GE, II, ITF, PFP, PM

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Areas: AI, IS, PE

Job Title: Principal

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Areas: AS, PM

Job Title: Consultant

norman.levine@raymondjames.ca

Phone: 416-997-4777

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Areas: AS, ESG, ETF, MU, PM
Job Title: CIO
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Harry Marmer, CAIA, CFA
Areas: AS, PM
Job Title: Executive Vice President
Hillsdale Investment Management
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Ahmed Mekawi, CFP, CFA
Areas: AS, CB, ESG, ETF, ETH, MF, PFP, PM, TD
Job Title: Private Wealth Manager, Financial Adviser,
Financial Planner
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David Onyett-Jeffries, CFA
Areas: AS, CC, EC, GE, PM
Job Title: Vice President
Guardian Capital Group
david.onyettjeffries@gmail.com
Phone: 647-669-2424

Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA
Areas: ESG, ETH, PFP, TD, TECH,
Job Title: Financial Planner, Portfolio Manager
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Phone: 416- 571-4529

Ron Schwarz, MBA, FLMI, CFA
Areas: EQ, PM
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Consultant & Equity Capital Markets Professional
schwarzkopf@rogers.com
Phone: 416-704-0525

Michael Sprung, MBA, FLMI, CFA
Areas: EC, EQ, PE, PM
Job Title: President and Chief Investment Officer
Sprung Investment Management Inc.
msprung@yahoo.com
Phone: 416-934-7160

Pamela Steer, CBV, FCA, FCPA, CFA
Areas: AC, AI, AS, D&E, EQ, ESG, ETH, II, PE
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CPA Canada
pamelasteer@hotmail.com
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Barbara Stewart, CBV, CFA
Areas: D&I, ESG, PFP, PM
Job Title: Researcher & Author
barbara@barbarastewart.ca
Phone: 416-818-4225

Thomas J. Trainor, FCA, CFP, CLU,
FCPA, MBA, PFS, CFA
Areas: ETF, PFP, PM, TD, TI
Job Title: Managing Director
Hanover Private Client Corporation
ttrainor@hanoverprivate.com
Phone: 416-594-3222

MEMBERS WILLING TO WRITE ARTICLES

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

Tarek Aeta , CFA (on healthcare issues)	10
Talbot Babineau, CFA	10
Steven Balaban, CFA	10
Iain Butler, FRM, CFA	10
Mark Carpani, FP Canada Fellow, CFA	10
Anish Chopra, CFA	10
Paul Gardner, CFA	11
Craig Geoffrey, CIM, MBA, CFA	11
Janine Guenther, CMT, CFA	11
Christopher Guthrie, CFA	11
William E. Hewitt, CFA	11
Yufei Man, CAIA, CFA	12
Ahmed Mekawi, CFP, CFA	12
Jason Pereira, CFP (Can, US), FP, MBA, RFP, CFA	12
Michael Sprung, MBA, FLMI, CFA	12
Barbara Stewart, CBV, CFA	13

GLOSSARY OF AREAS-OF-EXPERTISE ACRONYMS

AC	Accounting
AD	Academic
AI	Alternative investments
AS	Asset classes
BK	Bankruptcy
CB	Corporate bonds, high-yield securities
CC	Consumer confidence
CRT	Canadian Retirement Trends
DER	Derivatives, hedge funds
D&I	Diversity & inclusion
EC	Economics, Department of Labour, statistics, etc.
EQ	Equities, corporate earnings analytics
ESG	Environmental, social & governance
ETF	Exchange-traded funds
ETH	Ethical issues, investment
GE	Global events, overseas markets
II	International issues
IPO	Initial public offering
IS	Industry specialties
ITF	Income trusts, income funds
MU	Mutual funds
PE	Pensions
PFP	Personal financial planning
PL	Placements
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
CAIA	Chartered Alternate Investment Analyst
CBV	Chartered Business Valuator
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
CRPS	Chartered Retirement Planning Specialist
FCIA	Fellow of Canadian Institute of Actuaries
FCSI	Fellow of the Canadian Securities Institute
FLMI	Fellow, Life Management Institute
FMA	Financial Management Association
FRM	Financial Risk Manager
LLB	Law degree
MA	Master of Arts
MBA	Master of Business Administration
MSc	Master of Science
RP	Registered Psychotherapist
TEP	Trust and Estate Practitioner



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www.cfatoronto.ca

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info@cfatoronto.ca

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jobs@cfatoronto.ca

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