

Pension Plan Governors, Biographies

Pension Board

Mitchell Anderson, BA(Hons), MBA, MDiv(Hons)

Mitchell Anderson serves as a representative of the General Council Executive to the Pension Board. Mitchell is an ordained minister serving in Saskatchewan and a young leader in the church. He is dēnesuḡiné and was raised in rural Saskatchewan and has served rural communities of faith. Called to bivocational ministry, Mitchell holds an MBA and works as a management consultant in the areas of strategy and governance and serves on boards in the credit union system. Mitchell is passionate about building up a church with purpose that equips disciples of Jesus Christ to serve the mission of God.

Sharon Aylsworth Hons BA (Math)

Sharon Aylsworth serves as a Pension Board member-at-large, from March 2023. Prior to that, Sharon served as a representative of the General Council Executive to the Pension Board. In her working career, Sharon had years of computer systems development management experience with BELL Canada and CGI. Within the church, she has recently served on the executive of both Presbytery and Conference and as Chair of her local church council. She is a General Council Commissioner and a member of Shining Waters Regional council. She has used a wheelchair for over 15 years and brings a particular interest in disability and accessibility issues. With her husband, she lives in the Beach area of Toronto and attends Kingston Road United Church.

Darwin Bozek FCPA, FCGA, ICD.D

Darwin Bozek is the President & CEO of Alberta Pensions Services Corporation (APS), which provides pension services to more than 385,000 public sector employees and pensioners throughout the Province of Alberta. Since taking the helm in August 2017, Darwin has been leading APS through a fundamental organizational shift to bring a renewed focus on serving pension plan board clients and their members. His priorities include enhancing relationships with plan boards, encouraging greater collaboration across the corporation, and focusing on innovation and service optimization opportunities. Darwin is also committed to ensuring APS is well-positioned to deliver pension services now and into the future by building on the existing foundation of professional and dedicated employees and growing workforce capacity. Darwin has extensive leadership experience, with close to 30 years working in the public service. Prior to joining APS, Darwin was the Senior Assistant Deputy Minister of Alberta Treasury Board and Finance, where he planned and led cross-government transformation initiatives, including the consolidation of corporate financial services. His career also includes key responsibilities for accounting standards, compliance and risk management. Previous roles include Controller for the Province of Alberta; Chief Financial Officer for AIMCo and the City of St. Albert; Assistant Deputy Minister, Strategic and Business Services, Alberta Finance; and auditor for the Office of the Auditor General. Darwin started his accounting career as an articling student with Ernst and Young Chartered Accountants after playing professional hockey in the Los Angeles Kings organization. Darwin has a Bachelor of Commerce degree from the University of Alberta, and is a Fellow of the Chartered Professional Accountants. Darwin lives in Stony Plain, and enjoys his time away from the office spending time with his family and staying involved in the hockey community.

Tamara DeMos, FSA, FCIA

Tamara retired in June 2022 from her role as the Managing Director of the Private Pension Plans Division at the Office of the Superintendent of Financial Institutions (OSFI). In that role, she was responsible for all aspects of the supervision of private pension plans subject to Canadian federal legislation. These are pension plans whose employers' business activities are federally regulated, such as banking, telecommunications, inter-provincial transportation, and navigation and shipping, as well as private sector employment in the Yukon, the Northwest Territories and Nunavut, and employment in certain federal Crown corporations. Tamara joined OSFI in 2011. Prior to joining OSFI, Tamara was with the Treasury Board Secretariat where she held various roles related to the Canadian federal public service pension plan. Prior to 2007, she worked 18 years as a retirement consultant with Mercer. Tamara holds a Bachelor of Mathematics from the University of Waterloo. Tamara lives in Ottawa, has two adult children, Amanda and Evan, and in her spare time enjoys biking, hiking, cross country skiing, and cooking.

William Gilliland, BA (Hons), LLB, ICD.D

Bill is a corporate lawyer in the Calgary office of Dentons Canada, advising power and energy infrastructure companies on capital markets and M&A transactions, as well as board governance generally. Bill is a leader in ESG finance, representing Dentons Canada as a member of the International Capital Markets Association Green Bond Principles since 2014 and also as a member of the CSA Group's technical committee, developing the made in Canada Transition Finance Taxonomy following the 2019 recommendations of the Federal Government's Expert Panel on Sustainable Finance. Bill is a member of the Advisory Council to the Green and Social Bond Principles Executive Committee. Bill's work includes ESG and sustainable finance, including in the areas of green, transition and sustainability bonds. Bill is a co-leader of Dentons Canada's Sustainability Committee and has held various practice and office leadership roles. Bill has authored a publication on board responsibilities for climate-related disclosure.

Bill grew up in Winnipeg and has a BA (Hons) degree from Queen's University and an LLB degree from Dalhousie University, holds the ICD.D designation from the Institute of Corporate Directors and has completed the Board Oversight of Climate Change and Board Oversight of Strategy Courses. Bill currently is board chair of Wellspring Alberta, a charity providing cancer support services across Alberta, and has been on the board of Biathlon Canada and other volunteer-based organizations. Bill and his wife Lavina have been very active supporting Ukraine evacuees arriving in Calgary. Along with their son and daughter, Bill and Lavina enjoy outdoor activities including road and gravel cycling, cross-country skiing and hiking.

Hae-Bin Jung B.Th, MDiv, MTS

Hae-Bin Jung was born in South Korea, and graduated from Hanshin University in Seoul, where he earned B.Th (Bachelor of Theology) and M.Div (Master of Divinity) degrees. He was ordained in 1998 by the Presbyterian Church in the Republic Korea (P.R.O.K.) which has a mutual partnership with the United Church of Canada. He came to Canada in 2001, studied M.T.S. (Master of Theological Studies) at Emmanuel College and was admitted to the United Church of Canada in 2008.

Having served Meadowvale Korean United Church and Alpha Korean United Church for 20 years, he is now serving Wesley Mimico United Church in Toronto. He is also serving the Committee on Asian/North American Asian Theologies at Emmanuel College and the Korean Network in the United Church of Canada. As one of two members-at-large of the Pension Board, Hae-Bin not only strives to convey the various

interests and opinions of members to the Pension Board, but his lived experiences as a racialized person enable him to engage issues with a particular lens of diversity.

[Alison McKay, BA, BAdmin, CPA, ICD.D](#)

Alison McKay leads a team of professionals who administer the largest defined benefit pension plan in Saskatchewan, providing retirement income security for the province's healthcare workers. As Chief Executive Officer of the Saskatchewan Healthcare Employees' Pension Plan (SHEPP), she works with the Board of Trustees to establish the strategic direction of the pension plan, which serves 60,000 members and 50 participating employers, managing \$9 billion in assets. Alison was appointed CEO of SHEPP in 2014, following six years with the organization in various senior leadership roles including Interim CEO, Chief Financial Officer, Director of Finance and Administration and Operations Manager. Before joining SHEPP she held various pension administration and financial management roles with SaskTel and SaskEnergy. Devoted to promoting pension adequacy and eager to support meaningful discussions about public sector pension policy, Alison participates in the broader national pension scene as a co-chair of the Canadian Public Pension Leadership Council; member of the Pension Committee of the Victorian Order of Nurses (VON) and member of the Canadian Investment Review Board. Alison is a Chartered Professional Accountant and has a Bachelor's degree in both Mathematics and Administration from the University of Regina. She recently completed the ICD-Rotman Directors Education Program.

[Katharine Preston MBA, B.Eng](#)

Katharine Preston joined OMERS in August, 2019 as Vice President, Sustainable Investing. In this role, she assists OMERS with evolving its sustainable investing practices and liaises with OMERS investment, risk and communications teams on matters such as ESG integration, climate risk, and stakeholder communications and reporting. Prior to joining OMERS, Katharine served as Director, Responsible Investing at OPTrust, an Ontario-based public sector pension plan. At OPTrust, Katharine was instrumental in defining a strategy for integrating ESG factors into investment practices and leading the development of a Climate Change Action Plan. Prior to joining OPTrust, Katharine held positions with Innovest Strategic Value Advisors (now part of MSCI) and Stantec Inc. Katharine holds a Bachelor of Engineering, Civil and Environmental Engineering from McGill University, as well as an MBA from the Schulich School of Business, York University. She also holds a Certificate in Fundamentals of Alternative Investments from the Chartered Alternative Investment Management Analyst Association (CAIA).

[Thea Sheridan-Jonah](#)

Thea Sheridan-Jonah, is a full-time undergraduate student majoring in Political Science and minoring in Indigenous Studies at the University of British Columbia on unceded Musqueam land. She has worked for the GO project for the past two summers as a National Coordinator for the Youth Forum then Climate Motivator programs. She serves on the General Council Executive and General Secretary Advisory committee. She is also a member of the Rendez-Vous planning committee and the Pacific Mountain Regional Executive and previously served in Horseshoe Falls. Outside of the United Church Thea is especially passionate about harm reduction, decolonization, climate justice, and global solidarity. Throughout the year she works as the Substance Use Health Project Assistant at the UBC Wellness Centre, Chair of the Vancouver Chapter of Canadian Students for Sensible Drug Policy (CSSDP) and is a founding member of the UBC Harm Reduction Coalition. She has served on the national board of CSSDP as treasurer

for the past two years and is up for election as co-chair. As a student, Thea is guided by a love of learning and roots all her work and faith in justice.

Anne Soh (Chair), FSA, FCIA ICD.D

Anne Soh retired from her position as Vice President and Plan Actuary at the Ontario Municipal Employees Retirement System (OMERS) in January 2023. An executive with over 30 years of experience in the pension and benefits industry, Anne advised the OMERS boards of directors on plan funding and sustainability matters, overseeing the in-house actuarial department. Before joining the United Church Pension Board, Anne chaired the Pension Plan Advisory Committee from November 2013 to December 2020. She also serves on the Board of Directors and the Finance and Audit Committee of Canada's National Ballet School. In her cottage community, she is treasurer of the Sturgeon Point Golf Club and is a member of the Board of Directors of Sturgeon Point Association. Anne is a Fellow of the Canadian Institute of Actuaries and has an Hons. Bachelor of Science degree from the University of Western Ontario. She is also a graduate of the ICD – Rotman Director Education Program.

Joanne Wilson, BSc, MBA

Joanne retired as a Senior Consultant and Principal in Mercer's Toronto office at the end of May 2018. Her career spanned roles as a Senior Manager at PwC responsible for the firm's pension and savings programs, and managerial responsibilities at Fidelity Group Retirement and OMERS. She began her pension career at Ontario Teacher's. Joanne has been a member of the United Church of Canada for approximately 30 years. She has been involved in many aspects of the church through Sunday school and youth group leadership. She has also been a member of the Christian Fellowship Committee and Clergy Search Committee. Joanne and her husband have two sons and live in Etobicoke. They attend Applewood United Church in Mississauga. Since 2009, she has served as a Director for Ready? GET SET Work!, a charitable support group for unemployed individuals which is sponsored by her church.

Pension Plan Advisory Committee (PPAC)

James Clarkson, CPA, CA

James Clarkson joined the Pension Plan Advisory Committee in 2015. James is a Chartered Professional Accountant (CPA, CA) who graduated from the Richard Ivey School of Business program at the University of Western Ontario. He is currently working for the Toronto Transit Commission Pension Fund Society, a \$6.5 billion defined benefit pension plan. There he is involved in preparing and overseeing the audited financial statements, investment due diligence for new acquisitions, asset manager evaluation, performance attribution, compliance, and governance as both the Director of Finance and the plan's Treasurer. Prior to the TTC, James worked at Kraft Canada as a Manager of Pension Investments. His role at Kraft involved managing change related to corporate mergers, divestitures, annuity purchases, and partial windups through the oversight of 16 defined benefit/contribution plans. James' 19 years in the financial services industry have included increasingly senior roles at Ernst & Young, Assurance and Advisory Business Solutions Team, and London Life Insurance, where he had a number of roles, including Associate Manager of the Internal Audit Department and Manager within the London Capital Management division (Investment Manager for mutual and segregated funds) and administration of the Canada Life, Great West Life, and London Life Pension Plans. His interests include skiing, swimming, and running.

Juan Diz

Juan Diz joined the Pension Plan Advisory Committee in 2021. Juan is Vice President, Pension Solutions Group at the Healthcare of Ontario Pension Plan – HOOPP, a jointly sponsored defined benefit pension plan with over \$100 billion in assets under management. In his IT leadership role, Juan oversees the management of all the record keeping systems that service 400,000 Members, 650+ Employers and 250 staff managing the pension administration functions of the Plan. Juan joined HOOPP in July 2013, and has been in his current role since January 2017. Juan holds a BA in Mass Communications and International Relations from York University. Juan has been in the technology industry for over 20 years in various leadership roles with large Canadian financial institutions.

James Fera B.Sc, LLB

James Fera is the Director, Legal Affairs at the Colleges of Applied Arts and Technology Pension Plan (CAAT), an Ontario registered jointly sponsored pension plan. With over 15 years of experience practicing pension and benefits law at both major consulting and law firms, James advises CAAT on matters relating to the operation and administration of the plan as well as mergers with other defined benefit pension plans. James holds a bachelor of arts in political science and an LL.B. from Osgoode Hall Law School.

Audrey Forbes, BAS, CEBS, MPA (to May 2023)

Audrey Forbes is Senior Vice President, Member Experience at OPTrust, a jointly sponsored defined benefit public-sector pension plan with over \$25 billion in assets under management. In her role, Audrey oversees the pension administration function of the Plan, serving over 100,000 members and retirees. Ms Forbes holds a Master's degree in public administration from Queen's University, a Bachelor's degree in business administration from York University and is a Certified Employee Benefits Specialist (CEBS). She has served in the industry at three different public sector pension plans, OMERS, OPB and now OPTrust,

over the last 30 years. She has served on several local boards, volunteers within her the community and is active in a local faith-based organization.

[Peggy McCallum, BA \(Hons Journalism\), LLB, C. Dir.](#)

Peggy McCallum joined the Pension Plan Advisory Committee in 2023. She is a former partner and currently counsel at the Fasken law firm, where she served as chair of the pension and employee benefits law group for several years. She was previously senior legal counsel for the former Pension Commission of Ontario. She has been practising pension law since her call to the Ontario Bar in 1985. Peggy was a member of the Sponsors Committee of the Colleges of Applied Arts and Technology (CAAT) jointly sponsored Pension Plan for 12 years. She has served two terms as Chair of the Ontario Bar Association's Pension and Benefits Section and participated in various industry groups such as the Association of Canadian Pension Management. She is a director of the Financial Services Regulatory Authority of Ontario and of the Peterborough Regional Health Centre. She has received her Chartered Director designation from the Directors College at McMaster University.

[Laura Newman, FCIA, FSA](#)

Laura Newman retired after over 30 years as a senior retirement consulting actuary in Willis Towers Watson's Toronto office in 2020. Her clients included several large jointly-sponsored pension plans and other organizations in the broader public sector. In addition to holding the role of external actuary, she provided strategic consulting advice on the funding, accounting, investment and design of her clients' retirement arrangements. She held several internal leadership roles over the years focusing on managing and developing colleagues and the operational aspects of Willis Towers Watson's retirement business in Canada. Laura has extensive volunteer experience in the actuarial community including as a member of the Canadian Institute of Actuaries' Actuarial Standards Board. She is a recipient of the CIA's gold certificate of merit in recognition of her many professional contributions over the years.

[Kevin Pyo FSA, FCIA](#)

Kevin Pyo joined the Pension Plan Advisory Committee in 2021. Kevin is a Fellow of the Canadian Institute of Actuaries (2008) with over 20 years of pension and benefits industry experience. Currently, Kevin is AVP, Global Pension and Savings at CIBC. Kevin leads the enterprise strategy, design and governance of CIBC's global pension and savings programs. His accountabilities include oversight of all matters related to CIBC's pension plans from operations to governance reporting to the CIBC Board of Directors. Prior to CIBC, Kevin was a consulting actuary at various pension consulting firms in Canada assisting plan sponsors/administrators with a wide range of matters including plan design, strategy and funding. Kevin is also a member of the Federal Council of the Association of Canadian Pension Management, who provides input to regulators on legislative matters including funding regulations, plan operations and plan member communications. Kevin is passionate about improving the financial wellbeing of Canadians including financial literacy, financial resiliency and preparedness for the future. In his local church community in Toronto, Kevin is also an active member serving in several ministries.

Jacques Tremblay (Chair), FCIA, FSA, MAAA

Jacques Tremblay is a Partner with the Toronto Actuarial Consulting practice of Oliver Wyman, an operating company of Marsh & McLennan Companies.

Mr. Tremblay has over 30 years of experience in the Canadian life insurance industry. This experience covers, IFRS 17, financial reporting, solvency testing, product pricing, independent peer review, business appraisal, embedded value securitization, demutualization, liquidation, and expert witness. Mr. Tremblay is currently the Appointed Actuary for four clients. A Fellow of the Canadian Institute of Actuaries (CIA) since 1992, Mr. Tremblay is a Past President of the CIA (2014-2015) and a member of the International Actuarial Association (IAA) Executive Committee (2020-). Mr. Tremblay is a member of the Board of Directors for The Empire Life Insurance Company (Canada) (2014-), is Vice-Chair of the Board (2020-) and is Chair of the Risk and Capital Committee (2015-).

Investment Committee

Adam Buzanis, CFA

Adam joined CAAT in 2019 and oversees all aspects of the Plan's global private equity portfolio, with a focus on origination, execution and portfolio management. Adam has 16 years of investment management experience with a specialization in private equity and private credit. Adam serves on several corporate boards and the advisory committees of private equity partnerships globally. Adam is a Chartered Financial Analyst and earned a Master of Finance degree from the Smith School of Business at Queen's University.

Cathy Carlin, CFA

Cathy has over 30 years of experience in the investment management industry, specializing in public equities. Cathy spent 25 years at OMERS, a defined benefit pension fund, starting as a public equity analyst and recently retiring from executive level Senior Managing Director role, leading the global equity team. Prior to OMERS, Cathy worked for 5 years at TD Wealth, where she consulted with investment advisors in constructing portfolios for high-net-worth clients.

Cathy is a CFA charterholder and holds a BBA degree from Wilfrid Laurier University. She is currently an independent member on the Investment Review Board of Nicola Wealth Management. She is also a trustee of the Toronto Symphony Orchestra Foundation, is on the Board of CODE (an organization dedicated to children's literacy in Africa) and chairs the board of CODE Foundation.

Cathy and her husband have two grown sons and two Portuguese Water Dogs, all of whom love to spend time at the lake.

Doug Chau, CFA, PRM, CQF, M.Sc., PhD

Doug is the Chief Risk Officer and Head of Research at the University of Toronto Asset Management Corporation (UTAM). Doug joined UTAM in 2017 and is responsible for asset allocation modelling, risk management and measurement, research, and performance analysis. Previously, Doug worked for 15 years at OPTrust, where his responsibilities included developing strategic asset allocation models, researching risk factors, completing internal and external investment strategy evaluations, implementing performance and ALM systems, and developing a set of quantitative tools to inform investment decisions.

Doug holds a PhD in Finance from the EDHEC Business School, a Master's degree in Science with a specialization in Finance (M.Sc.) from the University of Reading, a Master's degree in Statistics (M.Sc.) from the University of Toronto, and an honours undergraduate degree in Mathematics and its Applications (B.Sc. Hons) from the University of Toronto. Doug holds the Chartered Financial Analyst (CFA), Professional Risk Manager (PRM) and Certificate in Quantitative Finance (CQF) designations.

Andrew (Andy) Greene, MA, CIM, CAIA (Chair)

Andy Greene brings over 25 years of investment experience in both the U.S. and Canada as a plan sponsor, portfolio manager, and investment consultant to his role on the Investment Committee. Andy is currently serving as the Chief Investment Officer for the Toronto Transit Commission (TTC) Pension Plan, a \$8bln defined benefit plan. Prior to this Andy spent eight years at OPTrust, as Director, Public Market Investments overseeing \$9bln in assets across equities, fixed income and hedge funds. Before his work at

OPTrust, Andy worked as Northern Trust Asset Management, the University of Wisconsin Foundation and Willis Towers Watson. He holds an MA in Applied Economics from Binghamton University and a BA in Economics from Ithaca College, the Certified Investment Manager (CIM) and Chartered Alternatives Analyst (CAIA) designations. He is a member of the CFA Institute, CFA Society of Toronto, and the Pension Investment Association of Canada (PIAC). In addition to his service to the UCC, Andy also serves on the Investment Committee for the York University Pension Plan. Andy lives in Toronto with his wife and three children.

Lori Hall-Kimm

Lori is currently the Head of Global Private Equity at Healthcare of Ontario Pension Plan (HOOPP). Since joining in 2022, Lori leads the Private Equity team and is responsible for the strategic, operational and investment activities for private capital. She also oversees its global portfolio, which ranges across a variety of industries and asset classes.

Prior to joining HOOPP, Lori spent six years with CPP Investments, most recently as Managing Director, Direct Private Equity, where she led the team responsible for the Consumer sector. Previously, she spent almost 11 years in the Private Capital team at Ontario Teachers' Pension Plan, helping establish their London office and leading their European fund and co-investments and also worked in investment banking at Goldman Sachs.

Lori holds a BBA (Honours) from the Schulich School of Business at York University and an MBA from Columbia Business School.

Sean Macaulay, CFA

Sean Macaulay has a breadth of experience in all aspects of operations of pension asset management. In 2020, he joined EagleTree Capital, ULC as an Operating Partner and is EagleTree's Chief ESG Officer. Previously, he was the head of private equity at the Investment Management Corporation of Ontario (IMCO) and was formerly the head of private equity at the Ontario Pension Board (OPB), an IMCO founding client. While at IMCO/OPB, Sean led IMCO's/OPB's private equity investments, served as a board member or advisor to numerous portfolio companies, led OPB's asset/liability studies, and developed OPB's initial external public markets manager review process, among other accomplishments. Prior to IMCO/OPB, Sean was a senior investment professional for the University of British Columbia Investment Management Trust and the head of the Vancouver investment consulting practice for Hewitt Associates. He received his Bachelor of Commerce (Honours) with Distinction from the University of Manitoba (1994), majoring in Actuarial Mathematics and Research/Operations Management and is a Chartered Financial Analyst (2003). Sean lives in Newmarket, ON, with his wife and two children.

Deborah Ng, CFA, M. Finance

Deborah Ng is the Head of ESG & Sustainability at Grantham, Mayo, Van Otterloo, LLC (GMO). Deborah is responsible for leading and accelerating the firm's ESG and sustainability-related initiatives. Specific areas of focus include working closely with the firm's investment teams as they conduct innovative research and further integrate material ESG factors into their processes; partnering with members of GMO's Investment Stewardship Group to expand issuer engagement activities; and advancing the firm's own sustainability goals.

Previously, Deborah was Director, Total Fund Management and Head of Responsible Investing at the Ontario Teachers' Pension Plan. Where she directed Deborah heads the Plan's Responsible Investing Strategy and Climate Change initiatives. She was responsible for key deliverables across a number of pillars, including: ESG and climate change thought leadership and innovation, ESG integration frameworks and tools, and corporate engagement.

Prior to this Deborah was part of the Strategy & Asset Mix team where she focused on the research, evaluation, and introduction of innovative asset allocation strategies that are designed to help meet the Plan's long-term liability objectives. She also provided input and support for the annual strategic investment plan and medium-term risk management.

She is a past director GRESB, BV (the Global Real Estate Sustainability Benchmark), and past Chair of its Infrastructure Advisory Board.

Prior to joining Teachers', Deborah founded Acuity Communications facilitating investment research communications for various financial institutions. Deborah was awarded with Director's Award from the Rotman School of Management, University of Toronto where she obtained her Master of Finance. She is also a Chartered Financial Analyst.

Steve Smith

Stephen joined HOOPP in 2010 as a Partner, Private Equity (PE). He played an active role in expanding the PE portfolio for more than nine years and continues as a Board member of one of HOOPP's largest PE investments.

Prior to joining HOOPP, Stephen was a Partner of KPMG LLP and a Senior Vice-President and Director of KPMG Corporate Finance, where he advised corporate clients on business development, strategic acquisitions, financing and divestitures.

In his current role as Head of Global Infrastructure, Stephen is responsible for overseeing all infrastructure investments and related portfolio activities. His infrastructure experience includes airports, toll roads, communication, and power generation and transmission. He received his Bachelor of Commerce from McMaster University and also holds a Chartered Professional Accountant designation.

Mary Anne Wiley, CFA

Mary Anne Wiley has over 25 years of experience in investments, pensions, and capital markets. During her 17 years with BlackRock and its predecessor Barclays Global Investors (BGI), she held various senior executive positions including Managing Director, Head of iShares Canada, where she oversaw the growth and expansion of BlackRock's ETF business into one of the country's largest fund complexes, and was a member of the executive team that led the acquisition and integration of Claymore Canada. Prior to iShares, she held several positions in BGI's Institutional Client Business and had account responsibility for some of the largest pension plans and other institutional clients across Canada. She started her career at State Street Global Advisors as Associate, Client Service. Currently, she is an independent business consultant to financial service providers, and is Director of Investments for the Salvation Army of Canada and Bermuda.

Mary Anne has extensive governance and Board experience. Currently, she is a Director of the Board and Chair of the Nominating Committee for NASDAQ CXC Limited (NASDAQ Canada) and a Trustee of the Board and member of the Audit, Finance, & Investment Management Committee for the Ontario Non-union Education Trust (ONE-T) ELHT. She is also a member of the Investment Committee for the Pension Plan of the United Church of Canada.

Mary Anne holds a BA from the University of Western Ontario and a Chartered Financial Analyst designation (CFA) from the CFA Institute.

Kathleen Wylie, CFA

Kathleen Wylie has worked for nearly 30 years in the financial industry. In 2021, she joined QV Investors Inc. to focus on business development and client relations after spending 18 years in manager research and 12 years as an economist. Her manager research experience includes three years at CIBC Asset Management as Executive Director in the Investment Management Research group with responsibility for leading a team of manager research analysts. Prior to that she worked for 15 years on the buy side at Russell Investments as Head of Canadian Equity Manager Research where she specialized in researching and ranking Canadian equity managers. As well, she has been an in-demand public speaker through-out her career and appeared regularly on BNN TV to discuss the Canadian active management environment. Prior to Russell Investments, Kathleen held a variety of economist roles on Bay Street, where she made use of her Bachelor and Master degrees in Economics, both from University of Waterloo. She is also a Chartered Financial Analyst. Kathleen is a member of Women in Capital Markets, and is involved in the “Up the Down Market” fundraising event in support of the Down Syndrome Resource Foundation. Kathleen is married and has two grown children. The family enjoys travelling together, with Greece, Paris, Walt Disney World, and Aruba among their favourite destinations.