



**CFA Society
Edmonton**

48th Annual

FORECAST DINNER

SPONSORSHIP OPPORTUNITIES



**WITH KEYNOTE SPEAKER
THE RIGHT
HONOURABLE
STEPHEN J. HARPER**

**March 12, 2026
Edmonton Convention Centre
Edmonton, Alberta**

EVENT OVERVIEW

The Annual Forecast Dinner is the premiere event for CFA Society Edmonton. The Forecast Dinner has been a tradition for the last 47 years where members, associates, and leaders from the business and investment community assemble to hear prominent members from the financial world speak.

The Benefits

The CFA credential is the most respected and recognized investment designation in the world. Have your brand showcased alongside a globally recognized credential in the investment management profession. CFA Society Edmonton's Annual Forecast Dinner allows your organization to reach Edmonton's entire financial ecosystem.



ABOUT THE SOCIETY

CFA Society Edmonton was established in 1976 to provide a professional association for individuals in the investment community. Our membership currently consists of investment counsellors, pension fund managers, corporate treasury, asset managers and advisors.

OUR TARGET AUDIENCE

- Accountants
- Advisors
- Asset Managers
- Chief Financial Officers
- Consultants
- Economists
- Finance Directors
- Financial Analysts
- Financial Sector Stakeholders
- Investor Relations
- Lawyers
- Managers
- Market Operators
- Risk Managers
- University Professors



OUR MISSION

To achieve professional excellence with the highest standards of ethics and education in the finance industry by engaging our members and our community.

TOP EMPLOYERS OF CFA SOCIETY EDMONTON MEMBERS

- AIMCO
- ATB Financial
- BMO Financial Group
- Canadian Western Bank
- CIBC World Markets Inc.
- Government of Alberta
- RBC
- Scotiabank Group
- TD Bank Financial Group



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2026 Fireside Chat



The Right Honourable Stephen J. Harper

For nearly a decade, The Right Honourable Stephen J. Harper led Canada through the world's most complex geopolitical, economic and security challenges as the country's 22nd Prime Minister. He created the modern Conservative Party of Canada, won three successive national elections, and was the longest serving Conservative Prime Minister since Canada's founding Prime Minister in 1891.

Since leaving office in 2016, Mr. Harper founded and is Chairman and CEO of Harper & Associates, a global consulting and strategic advisory business, and is Chairman and a founding partner of Vision One, a fundamental value-oriented investment fund based in Miami, Florida.

He serves as Board Chair of the Alberta Investment Management Corporation (AIMCo), Director of Colliers International Group Inc. and Alimentation CoucheTard Inc., and is President of the Advisory Committee of Awz Ventures, a technology focused Canadian-Israeli venture capital firm. Mr. Harper is also the author of *Right Here, Right Now: Politics and Leadership in the Age of Disruption* and a frequent speaker on geopolitical trends, populism, and business. His latest book, *Flags of Canada*, was published in February 2025 in association with the Royal Canadian Geographical Society commemorating the 60th anniversary of Canada's national flag.

Mr. Harper serves as Chairman of the International Democracy Union and is a member of the Global Advisory Board of India's Observer Research Foundation. He holds bachelor's and master's degrees in economics from the University of Calgary, was awarded an honorary Doctor of Philosophy from Tel Aviv University and received an honorary degree from the Jerusalem College of Technology. He is a Companion of the Order of Canada, a member of the King's Privy Council for Canada, and is the recipient of the Alberta Order of Excellence plus numerous international recognitions including the Order of Liberty, Ukraine's highest civilian honour.

Mr. Harper resides in Alberta, Canada with his wife Laureen; they have two adult children, Benjamin and Rachel.

MODERATOR

Chris Turchansky, BCom, MBA
President and CEO
ATB



Chris Turchansky became ATB Financial's President and CEO on January 1, 2026. He knows the important role ATB plays in supporting its clients by fostering a culture of client obsession. He also sees ATB's more than 5,000 team members as its greatest strength and is committed to creating an environment where they can thrive and make an impact through the deep expertise and exceptional experiences they provide.

Chris holds a Commerce degree from the University of Alberta, an MBA from Athabasca University, and carries the Chartered Financial Analyst (CFA). He also serves on the board of the Hockey Alberta Foundation.



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2026 PANEL DISCUSSION

MODERATOR



Brian Carney, CIM
Portfolio Manager, Fixed Income
Mawer Investment Management Ltd.

Brian Carney is a fixed income portfolio manager focused on global credit strategies at Mawer Investment Management Ltd., which he joined in 2023. Mr. Carney has over 30 years of experience in the investment industry. Most recently, he spent a decade as a portfolio manager at Canso Investment Counsel Ltd. From 2009–2012, he ran high-yield focused Big Rock Capital Management Inc.

Prior to founding Big Rock, Mr. Carney worked at Merrill Lynch from 1997–2008.

Brian started his career at Goldman Sachs in 1990. At Merrill and Goldman his responsibilities included corporate research, counterparty risk management, rating agency advisory, syndication, and trading. Mr. Carney has worked in New York, London, and Toronto.

Mr. Carney received his Bachelor of Arts in Government and International Studies from the University of Notre Dame. He holds the Chartered Investment Manager designation from the Canadian Securities Institute.

PANELISTS



Jonathan Curtis, BS, MBA
Executive Vice President and Chief Investment Officer of Franklin Equity Group (FEG)
Franklin Templeton

Mr. Curtis has oversight of San Mateo and New York-based investment teams who manage equity and convertibles strategies, along with

Franklin Equity Group's research and venture capital teams and other supporting functions. Mr. Curtis has been active in the tech sector for more than 30 years, first as a software development and integration test engineer and now as an investor. Mr. Curtis holds an M.B.A. from UC Berkeley's Haas School of Business and a B.S. in Electrical Engineering from Rensselaer Polytechnic Institute in Troy, NY.



Richard Mathieson, CA
Managing Director
BlackRock Systematic Investment Team

Richard is a member of BlackRock's Systematic Active Equity Investment Group. He is a Portfolio Manager responsible for global equity strategies. Prior to this he led the

Investment Strategy team in EMEA for Systematic Active Equity. Mr. Mathieson's service with the firm dates back to 2002, including his years with Barclays Global Investors (BGI), which merged with BlackRock in 2009. Mr. Mathieson qualified as a Chartered Accountant with PricewaterhouseCoopers in 2000, and holds a Bachelor of Accountancy from the University of Glasgow.



David Wang, PhD, CFA
Global Head of Data, Analytics, and AI Services Senior Vice President
State Street Investment Management

David has 25 years in asset management industry from technology to business, data to insight, and back office to front office. David was head of Artificial Intelligence and Financial Engineering team at State Street Corporation. David received PhD in Computing Engineering, MS in Computer Science, MBA in Entrepreneurship, and BS in Industrial Automation. Additionally, he holds Chartered Financial Analyst certification.



SPONSORSHIP OPPORTUNITIES

TITLE SPONSOR **\$20,000**

One Available

- Three tables at event with prime placement
- Company name/logo on all Forecast dinner social media and marketing announcing as Title Sponsor
- Title Sponsor banner designed and displayed at event
- 10 minute speaking opportunity
- Full page ad in the event program
- Verbal recognition during event program
- Six individual social media posts (pre and/or post event)
- Access to the VIP reception for all your guests where they can mingle with the keynote and panelists

GOLD SPONSOR **\$12,000**

Three Available

- AV Sponsor
- Keynote Sponsor
- Panel Sponsor

- Two tables at event with prime placement
- Shared banner for all gold sponsors designed and displayed at event
- Keynote and Panel Sponsor are given the opportunity to introduce the Keynote/Panel Moderator. AV sponsor is given the opportunity to introduce the Elder Address
- Half page ad in the event program
- Verbal recognition during event program
- Four individual social media posts (pre and/or post event)
- Access to the VIP reception for all your guests where they can mingle with the keynote and panelists

SILVER SPONSOR **\$7,500**

5 Available

- Champagne Sponsor
- Dessert Sponsor
- Dinner Sponsor
- Gift Sponsor
- Program Sponsor

- One table at event with prime placement
- Shared banner for all Silver sponsors designed and displayed at event
- ¼ page ad in the event program
- Verbal recognition during event program
- Three individual social media posts (pre and/or post event)
- Access to the VIP reception for all your guests where they can mingle with the keynote and panelists

BRONZE SPONSOR **\$5,000**

10 Available

- Reserved Half table at event
- ¼ page ad in the event program
- Verbal recognition during event program
- One individual social media post (pre and/or post event)
- Access to the VIP reception for all your guests where they can mingle with the keynote and panelists



CFA Society Edmonton

A la cart Sponsorship Opportunities. One (?)
Available for each:

- Volunteer of the Year Award Sponsor (\$750)
- Forecaster of the Year Award Sponsor (\$750)
- Coat Check Sponsor (\$500)
- Elder Address Sponsor (\$500)



**Don't miss out on your opportunity to sponsor
this extraordinary event and be part of an
unforgettable evening that will leave you
inspired, informed, and ready to take on the
future of finance.**

**Click Here to Submit Your
Sponsorship.**

CONTACT US

Please email all sponsorship inquiries to
info@edmontoncfa.ca

☎ 780-433-9739

🌐 <https://cfaedmonton.ca>

✉ info@edmontoncfa.ca

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