



Are you ready for the changing world of asset management?

June 4, 2015 at 4:30 PM
Toronto

New behaviours. New technologies. New investors. The dynamics of asset management today demand that individual advisers and asset management firms seek new ways to fuel growth, improve operational effectiveness and increase alignment of interests with their investors and clients. How are investor needs changing? What are the implications for the traditional buy-side and sell-side careers in Canada? Join us to help your firm take advantage of the game-changing processes underway from an operational perspective. Plan now to position yourself for the future as roles evolve accordingly.

Participants

Jim Beqaj, Beqaj International

Randy Cass, Nest Wealth

Loren Francis, Barometer Capital Management

Peter Hayes, *Moderator*, KPMG

Event Details

Date: June 4, 2015

Time: 4 PM Registration.

We will begin *promptly* at 4:30 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Networking and cocktails before and after session.

Host: KPMG

Location: Bay Adelaide Centre, Suite 4600, **Toronto**, ON M5H 2S5, Canada

RSVP: [RSVP Now](#)

If you have any questions about this event, please contact the [Toronto](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission to this event is free, but there is a 25 CAD charge if you register and do not attend (even if you cancel in advance). No-show proceeds will be donated to our 2015 beneficiary.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted.

Biographies

Jim Beqaj, Founder, Beqaj International

Jim Beqaj founded Beqaj International in 2002 to advise companies on strategic directions for future development, to recruit talent and to provide leadership coaching. As a trusted advisor, he uses his talents, experience and energy to meet his clients' most relentless challenge - finding and attracting talented teams and individuals who fit the business and culture. He has personally hired over 900 people in his career and has great insight into business cultures and individuals. As former President and Chief Operating Officer of Wood Gundy, Jim led the integration with CIBC and expansion into the U.S. in the early 1990s. When he hired over 450 people in 18 months, Jim realized that putting the right talent together was the most important part of the job and what he enjoyed the most. He also co-founded BayStreetDirect.com, an online IPO and Private Placement company that revolutionized the way securities were delivered to the public. In 2000, it was ranked 11th out of the Top 25 Internet Companies. Jim graduated from Queen's University in Kingston, Ontario, in 1977.

Randy Cass, Founder, CEO, Portfolio Manager, Nest Wealth

Randy Cass, CFA, LLB, MBA, has been involved in financial services for more than 15 years. Prior to founding Nest Wealth, he managed quantitative portfolios at the Ontario Teachers' Pension Plan and institutional assets at Orchard Asset Management. Randy's last start-up, First Coverage, won multiple awards as a top start-up including a financial services Morningstar award for best use of Technology in Canada. First Coverage expanded into the United States and UK and was ultimately sold to a UK company in 2011. Randy has been hosting Market Sense on BNN since 2012 and has been working on Nest Wealth so Canadians can have a real choice when it comes to how they want to invest for their future.

Loren Francis, Portfolio Manager & VP Private Client Group, Barometer Capital Management

Loren Francis, FCPA, CPA, Portfolio Manager & Vice President Private Client Group, advises high net worth clients. In her role, Loren is responsible for managing client relationships and developing new business opportunities. This includes an understanding of clients' portfolio objectives and requirements, designing the portfolio investment policy statement to meet those objectives, and for ensuring the timely review of client portfolios. Loren completed her MBA at the University of Toronto, and early on in her career worked at Coopers & Lybrand while earning her Chartered Accountant designation. Loren also holds the Canadian Investment Manager designation from the Canadian Securities Institute. Loren has over 20 years of experience in the capital markets in both wealth management and investment banking. Prior to joining Barometer, Loren worked as a Portfolio Manager with Cumberland Private Wealth Management, and as Vice President, CIBC Private Wealth Management. Loren has worked with many midmarket clients on business succession planning, including the transition of a business, liquidity events and exit strategies and the implementation of wealth management solutions. During her 10 years in investment banking at CIBC World Markets, Loren was involved in numerous IPOs, debt and equity issues and M&A transactions. Loren is currently on the board of the Oakville Hospital Foundation (since 2008) and is a member of the Investment Committee for the Community Foundation of Oakville (since 2013). She is past board member and Co-Chair of Fundraising for Sheena's Place, a registered charity offering hope and support for patients with eating disorders. Loren resides in Oakville with her husband Mark and three children, two daughters and a son, ages 20, 18 and 16. Loren and her family are avid sports enthusiasts, particularly hockey, soccer, basketball, skiing & snowboarding. Loren's interests also include contemporary art and photography, and reading as many books as she can find time for especially about people, places and positive thinking.

Peter Hayes, Partner, KPMG

Peter is an audit partner at KPMG and the national director of their Canadian alternative investments practice. His clients include Canadian, U.S. and international hedge funds, reporting issuer mutual funds and asset managers, and their service providers. Peter re-joined KPMG after spending several years developing and managing alternative investment products with Citigroup Alternative Investments in New York. Prior to this Peter was an audit manager in the alternative investment practice of KPMG in the Cayman Islands. Peter began his career with KPMG in Vancouver where he worked on client engagements in a variety of industries. Peter is actively involved in a variety of regulatory and professional initiatives related to the asset management industry and sits on the Legal and Finance Committee of the Alternative Investment Management Association (Canada Chapter).



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About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)

100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted close to 500 industry education events globally, connected more than 250 senior women through Peer Advisory Groups and raised over \$36 million for philanthropic causes in the areas of women's health, education and mentoring.