campaign impact report

TOGETHER WE ... UNDERSTAND » APPLY » INTEGRATE

a firm foundation for a bright future
A WELL-DESERVED REPUTATION

In 1957, the University of Waterloo’s first president, Gerald Hagey, declared his vision for the fledgling institution was “to develop courses in line with our country’s present and future needs.” In keeping with that vision, the School of Accounting and Finance (SAF) was established in 1981 to help meet the changing needs of accounting education in Canada.

From its earliest days, the School has focused on building quality programs and attracting top-notch students and faculty. In just three decades, it has grown to become the country’s premier professional school of accounting and finance, leading the industry in producing the best accounting and finance talent in Canada.
FROM THE DIRECTOR

“In the two years since the successful completion of A Firm Foundation for a Bright Future, we have celebrated many achievements that have solidified our reputation as a leading provider of talent to Canada’s economy and a powerhouse in accounting and finance research.

I want to express my sincere gratitude to Campaign Chair Mike Garvey and our Campaign Committee (all of them Waterloo alumni) for their tireless dedication and for leading by example and inspiring others to give. And thank you, our alumni and friends, for believing in the importance of supporting the campaign.

I hope that you will take a few minutes to read about the impact your contributions continue to make across the School. Your gifts allow us to fulfill our mission by educating future graduates to follow in your footsteps, and through novel research that enhances public and business policy.

We have much to do in the years ahead, and I encourage you to remain involved by making a meaningful gift, mentoring students or staying connected with our Alumni Association.

THOMAS W. SCOTT, Director, School of Accounting and Finance
A FIRM FOUNDATION FOR A BRIGHT FUTURE

In 2001, as part of the University of Waterloo’s Building a Talent Trust campaign, the School of Accounting and Finance embarked on a capital campaign to raise funds for the construction of a new home.

Eight years later, alumni and friends gathered to celebrate the opening of the new state-of-the-art facility. Linked to the J.G. Hagey Hall of the Humanities, the $12 million, 50,000 square-foot building boasts a 200-seat lecture hall, six new classrooms, meeting spaces and offices for faculty and staff. The new facility provides a rich teaching, learning and research environment and promotes a strong sense of pride, place and community.

Building on the success of the capital campaign, SAF leadership set their sights on a new goal: to double the size of the endowment to support the School’s rapid growth. A Firm Foundation for a Bright Future represented the largest fundraising campaign in the School’s history. Efforts focused on increasing support for four key areas: student financial support, the Alumni Excellence Endowment Fund, program and curriculum development and the Student Investment Fund.

Just four years later, A Firm Foundation for a Bright Future proudly celebrated $8.2 million raised!
“I am profoundly grateful to every member of our campaign committee for your leadership and for rallying friends, colleagues and industry partners in support of the campaign. Your abiding faith in the calibre of SAF students, faculty and graduates has been constant over the three decades of the School's history. Because of you, SAF continues to shape accounting and finance education in Canada and be a leading provider of talent to Canada’s business community. Thank you for ensuring a bright future for the School of Accounting and Finance.”

MIKE GARVEY, Campaign Chair

A Firm Foundation for a Bright Future

your impact

$8.2 M raised, doubling the endowment to more than $13 M

More than 1,250 gifts were made to the campaign

More than 880 donors supported the campaign

OUR CAMPAIGN COMMITTEE

- **Mike Garvey** (Campaign Chair) FCPA, FCA, ICD.D (BA ’69)
- **Cynthia Ditner** FCPA, FCA, CMA — BDO Canada (MAcc ’86)
- **Andrew W. Dunn** FCPA, FCA — Altas Partners LP (MAcc ’87)
- **Betty Ann Jarrett** CPA, CA — PwC (MAcc ’86)
- **Doug McPhie** FCPA, FCA — EY (BES ’78)
- **Chuck Ormrod** CPA, CA — KPMG (BMath ’82)
- **Benjie Thomas** CPA, CA — KPMG (BA ’98, PDAcc ’98)
- **Karen Wilkinson** FCPA, FCA — Deloitte (MAcc ’90)
More than 100 students received a financial award last year.

By offering students a generous program of merit- and need-based scholarships and bursaries, the School can attract the most promising among them. Awards such as SAF International Experience Awards allow students to explore their passions through unique learning opportunities abroad. The international perspective helps shape their world view, and influences them intellectually and emotionally.

“By doing an extra year of undergrad, I was able to go to the University of Sheffield in England. I broadened my knowledge by taking many classes outside of my accounting major, learned about different cultures, backpacked from Germany to Bosnia-Herzegovina, and most important of all, I made lasting friendships with people from all over the world. It was a fantastic opportunity, and I am very grateful for the scholarship which helped alleviate some of those financial burdens so I could concentrate on the experience. Thank you for making it possible.”

SOPHIE LAI, Recipient of an International Experience Award.

The Alumni Excellence Endowment Fund now stands at more than $400,000.

In a constantly evolving economy, the School of Accounting and Finance must anticipate and respond to the professional and business challenges and opportunities before us. The Alumni Excellence Endowment Fund provides a flexible source of funding to support new projects, resources and programs for students and faculty that will allow the School to stay at the top of its game.

“The Alumni Excellence Endowment Fund means that, as alumni, we can invest in the future of the School knowing that the funds will be directed to areas of the highest priority. By establishing a fund designed to meet the ever-changing demands of the education sector, we are ensuring that the reputation and quality of education at the School continues to be world class. This flexible, responsible, and forward-thinking approach benefits not only students and faculty, but also its alumni globally, ensuring that the great brand of the School is maintained.”

BETTY ANN JARRETT, Campaign Committee Member
BEYOND TECHNICAL KNOWLEDGE

The new Learning Model integrates in-class projects, extra-curricular competitions, professional conferences and co-op work experiences.

Through these hands-on initiatives, students gain functional competencies in accounting AND finance, develop an understanding of business and economics, as well as ‘soft’ skills in problem solving, communication, ethics, leadership and collaboration. This valuable mix of knowledge and skills produces the kind of innovative professionals our world economy demands.

“Under the new learning model, students learn to think on their feet. As an example, students start with a case study, and using ‘real-life’ resources such as company reports and web pages, videos of news conferences and industry databases, they do additional research to source relevant information. Then they develop a plan and make recommendations on how to move forward. Through these kinds of experiences, students develop the competencies and confidence to navigate their way through increasingly complex situations.”

NANCY VANDEN BOSCH, SAF Faculty member

STUDENT INVESTMENT FUND

Last year, students managed $150,000 in investments through the Student Investment Fund.

In 2011, a generous donation launched the Student Investment Fund. This experiential learning initiative allows upper-year students to gain two years of experience managing real money. Under the guidance of faculty members and industry mentors, students receive training in equity evaluation and portfolio management. These hands-on experiences create a talented pool of industry-ready graduates who are positioned for success in the financial world.

“The Student Investment Fund is one of the best ways to get involved at Waterloo if you are interested in the capital markets. The experience allows students to manage real money, share ideas with industry professionals, and be guided by finance faculty. On top of that, they are working with an exceptional peer group, and that makes the experience a lot of fun. The Student Investment Fund made me a stronger candidate going into the workforce.”

KRISHNA MURALI, CEO (for Fall 2014 term) Student Investment Fund
PLEASE GIVE OF YOUR TIME, TALENT AND TREASURE

We are grateful for the many ways our alumni and friends give back and stay connected to SAF through your volunteerism, the sharing of your expertise and leadership, and your generous financial support.

CONTACT US

Thomas W. Scott
SAF Director
519-888-4567, ext. 32885
twscott@uwaterloo.ca

SAF Alumni and Advancement Office
519-888-4567
Sheilaah Guthrie, ext. 39917
sheilaah.guthrie@uwaterloo.ca

Alexandra Lippert, ext. 38227
allipper@uwaterloo.ca

uwaterloo.ca/saf/get-involved

JOIN US ON

LinkedIn and Twitter