

EDUCATION THAT MATTERS: **UNDERSTAND, APPLY, INTEGRATE**



AWARDS 2015 | SCHOOL OF ACCOUNTING AND FINANCE DINNER

THURSDAY, NOVEMBER 12, 2015

6:00 RECEPTION | 6:45 FORMAL PROGRAM
UNIVERSITY OF WATERLOO | FEDERATION HALL



UNIVERSITY OF
WATERLOO

SAF masters of ceremonies

SAF director's message

I would like to welcome everyone to the University of Waterloo campus for this special evening of fellowship. The 12th Annual Awards Dinner celebrates success with our distinguished honourees, students, donors, faculty members, and friends. The School is grateful for your continued involvement and on-going support.

Our School is growing with admissions this year of more than 500 undergraduates, 200 MAcc students, 40 MTax students, and 4 PhD students. We continue to be the leading school, graduating students with an integrated knowledge of accounting and finance. We look forward to an exciting year ahead with the opening of a new Finance and Analytics Lab at Waterloo and a new Masters of Taxation campus at the Eaton Centre in Toronto.

We are tremendously proud to be a research leader, placing 27th globally and 2nd in Canada for accounting research. Our research centres bring academics and practitioners together to collaborate on tax, systems and ethics. The following three major academic-practitioner conferences were held this year: The Waterloo Tax Symposium, the 9th Biennial Symposium on Information Integrity and Information Systems Assurance, and our Ethics Symposium focusing on Accounting Ethics and Regulation: SOX 15 Years Later.

This event reminds us of how much the School's students, alumni, and faculty members have achieved. Together we continue to grow, and contribute meaningfully to our organizations and communities. Thank you for joining us. I look forward to sharing news and updates with you throughout the year.

Congratulations to our 2015 Alumni Award Winners — Upkar and Meng!



Thomas W. Scott, PhD (Queen's)
Director, School of Accounting and Finance



"The School of Accounting & Finance's accomplishment is defined by dedicated students and faculty who collaborate in learning, often with the help of alumni who return and share in the learning process."

AFM Students



Bill Yeh

Bill is grateful to be able to be a part of the amazing mentorship cycle in the School of Accounting and Finance both as a mentee to his Fellowship Honouree and scholarship donor, and a mentor to AFM students in their junior years. Bill thoroughly enjoys contributing to this cycle through various leadership roles within on-campus clubs such

as the co-chair position for the Faculty of Arts Orientation team he took on for this fall's incoming class. Having an optimistic view of life leads him to believe that there are no problems that cannot be solved, and he would like to bring his view and energy to the not-for-profit sector in the future through entrepreneurial ventures.



Rebecca Yao

Rebecca is finishing her fourth year in the AFM program and will return to TD Securities Investment Banking full time next fall. She is involved in the School's finance initiatives, having co-chaired the Canada-wide hEDGE Finance Conference and participated on the Student-Run Investment Fund, as well

as various finance and stock pitch competitions. During her time off after graduation, she plans to focus on her interests such as snowboarding and interior design, and travel to Japan and Norway.

J. Page R. Wadsworth Chair



The School of Accounting and Finance welcomes Dr. Jeong-Bon Kim. Dr. Kim comes to Waterloo from the City University of Hong Kong, where he held concurrent positions of Chair Professor of Accountancy and Head of the Department of Accountancy. Dr. Kim is the incoming J. Page R. Wadsworth Chair in Accounting and Finance for the School.

Dr. Kim's research leadership and record of exemplary work with doctoral students, young faculty, and researchers aligns well with the mandate of the J. Page R. Wadsworth Chair. Dr. Kim, through his research and mentorship, will enhance

the School's strong research reputation here at the University of Waterloo.

Established through donations in 1983, the J. Page R. Wadsworth Chair honours Mr. Wadsworth who was a prominent Canadian banker and served on the University of Waterloo Board of Governors for 23 years. Mr. Wadsworth's term included chairing the Board of Governors from 1977 to 1983. He served as Waterloo's Chancellor from 1985 to 1991 and since has held the title of Chancellor Emeritus.

Dr. Kim is a welcomed addition to the School of Accounting and Finance.

CPA Ontario Chair



J. Efrim Boritz is a long time professor and CPA Ontario Chair at the School of Accounting and Finance. For over seventeen years, Efrim has been the Director of the University of Waterloo Centre for Information Integrity and Systems Assurance (UWCISA).

Efrim has been the recipient of numerous honours and awards. Most recently, he received the 2015 Outstanding Educator Award from the Strategic and Emerging Technologies Section of the American Accounting Association.

Efrim serves as a true leader and role model for our faculty and students.

Faculty awards

The School's distinguished faculty members have been the recipients of many esteemed awards.

Haim Falk Award for Distinguished Contribution to Accounting Thought

- » Patricia O'Brien (2009)
- » Anthony A. Atkinson (1989)
- » William R. Scott (1988)

L.S. Rosen Award Outstanding Educator

- » Theresa Libby (2014)
- » Alan Webb (2011)
- » Duane Kennedy (2008)
- » J. Efrim Boritz (2006)
- » William R. Scott (2005)
- » W. Morley Lemon (2004)
- » Howard Armitage (2000)
- » Stanley L. Laiken (1997)
- » John R. Hanna (1986)



research and learning centres

Professional centres interfacing with industry

Centre for Accounting Ethics »

To prepare future accountants and financial managers to exercise professional judgement within an ethical framework and to promote high ethical standards.

Waterloo Centre for Taxation in a Global Economy »

To support academic research focused on taxation in a global economy and to disseminate that knowledge to tax professionals in corporations, governments, and the intermediaries between the two.

University of Waterloo Centre for Information System Assurance (UWCISA) »

To stimulate relevant research, support the development/delivery of educational materials, communicate about important ISA issues and Centre activities and promote interaction among ISA educators and practitioners.

Educational centres

Centre for Accounting Research and Education (CARE) »

To ensure the excellence in the areas of fundamental and applied accounting research and accounting education.

CPA-SAF Centre for Capital Markets Education »

To provide opportunities for undergraduate accounting and finance students to develop the competencies, professionalism, and practical experience as well as capital markets knowledge and skills essential for any professional accounting and finance career.

CPA-SAF Learning Centre »

To provide support and resources for the Masters of Accounting program and students, including faculty research initiatives, exam prep sessions, software and study cases.

SAF alumni award winners

The School of Accounting and Finance Alumni Achievement Award recognizes an alumnus who has distinguished themselves through their professional achievements, as well as community and public service.



2015 SAF Alumni Achievement Award Winner

Upkar Arora, MAcc '85, CPA, CA, ICD.D »

Upkar Arora is CEO of Illumina Partners, a boutique advisory firm specializing in providing strategic, operational and financial expertise. He has 30 years of experience working domestically and internationally with public and private companies, on operations, capital markets transactions, acquisitions, dispositions, turnarounds and financings, as a senior executive, advisor or principal in several industries.

Upkar obtained his CA and CMA designations in 1986, placing in the top 5 in Ontario on his qualifying exams, and his Independent Corporate Director (ICD.D) designation in 2011. He was valedictorian and a proud MAcc graduate from the first UW accounting class in 1985.

Upkar has been a strong supporter of the School for the past thirty years. He has taught, established several scholarships, been recognized as an Honouree in the School of Accounting and Finance Fellowship Program, spearheaded the innovative Success Beyond the Classroom series and currently serves on the SAF Advisory Council.

Upkar is Chair of the Board of the McMichael Canadian Art Collection and also serves on the Institute for Canadian Citizenship and Metrolinx boards.

The School of Accounting and Finance Young Alumni Award recognizes an alumnus who demonstrates these same qualities who has graduated in the last 10 years or is 35 years of age or younger.



2015 SAF Young Alumni Award Winner

Meng Wang, BAFM '12 »

Since graduating in 2012, Meng has established a dynamic career path. Meng is currently an Operations and Logistics Manager for UberEATS, which she helped launch in May 2015. She spends most of her time designing menus and processes, building relationships with celebrity chefs, and testing meals from some of the best restaurants in Toronto. Prior to Uber, Meng worked as an Investment Banking Analyst at TD Securities. Meng holds a Bachelor of Accounting and Financial Management (with Distinction) from the University of Waterloo. She was a Lloyd Carr-Harris Foundation Scholarship winner and a School of Accounting and Finance Fellow.

Despite her busy schedule, Meng has remained close to the School, dedicating her time to numerous student events including being a guest speaker for SAF Professional Women's Network, facilitator of an Explore Your Career workshop, and mentoring students through the SAF Mentorship Program and Student Investment Fund. Meng leads by example and demonstrates what it is to be a proud SAF alumna.

An alumnus nominated by their peers will have achieved a notable level of success and participated in activities that inspires other Waterloo alumni, and students, whether in their careers or through volunteer and community involvement.

To nominate SAF alumni or for additional information, please contact Alex Lippert at 519-888-4567, ext. 38227 or allipper@uwaterloo.ca.

SAF make an impact

Scholarships and awards support student success

“Rewarding bright, talented students for their efforts will not only make a direct impact on their lives, it will also impact our university community as a whole as we follow through with our goal for making the future better for Canada and the world.”

— **Feridun Hamdullahpur**, University of Waterloo President and Vice-Chancellor

Scholarships and awards make a significant impact on a young person's education — especially today, as many students and families cope with the cost of professional education. Thankfully, a number of alumni and supporters of the School of Accounting and Finance are meeting the challenge and setting up awards to benefit a new generation.

Last year, more than one hundred SAF students received entrance and upper-year scholarships, and scholarships and awards in the MAcc, MTax and PhD programs. A greater array of awards and scholarships will mean more students can focus completely on their studies. This will help them get the most out of their educational experience at Waterloo — and retain a competitive advantage in the marketplace and in their careers.

The School is grateful for the support we've already received from alumni but there is much more to be done. All SAF alumni are invited to join with us to expand the number of awards and scholarships and meet the increasing needs of our students.

» Awards and scholarships benefit students in the 4-year AFM program (tuition: \$66,000), and the 1-year MAcc program (tuition: \$15,000).

» **Our Goal this year is to raise \$100,000 in donations to help fund new awards and scholarships.** Additional entrance scholarships will attract outstanding students, and upper-year and graduate awards and scholarships will retain top undergrads and ease the financial burden for graduate students.

Join us and help support our students! Contact **Sheilaah Guthrie**, Associate Director of Advancement (Fundraising and Alumni Relations) at sheilaah.guthrie@uwaterloo.ca; or 519-888-4567, ext. 38917.

“We make a living by what we get, but we make a life by what we give.”

— **Winston Churchill**

SAF scholarship recipients

Thank you to all of our scholarship and award donors who help us ensure that all qualified students have access to the best university education possible.

UNDERGRADUATE AWARDS

- Benjamin Ahier**
Xuan Chen
A.B. McKie Memorial Scholarship
- Bojan Jonceviski**
Anish Chopra Excellence in Finance Scholarship
- Yifan Li**
Art Headlam Accounting Entrance Scholarship
- Phoebe Wong**
Barr Family Entrance Scholarship
- Hanning Cai**
Sophie Liu
Chris Mathew
Janani Nirthanarajah
Bill Harvie Scholarship/Fellowship
- Yu Chen**
Louise Choi
Tianjia Huang
Luming Jia
Haider Khan
Matthew Watson
Ning Xu
Catherine E.B. Hanna Accounting Entrance Scholarship
- Kevin Shin**
Chachra Family Entrance Scholarship
- Yun Jiang**
Charles Knight Entrance Scholarship
- Thomas Cheng**
Julie Rainville
Christopher and Claire Govan Scholarship

- Abeera Mohyuddin**
David & Elizabeth Forester Scholarship
- Edmond Hu**
Bianca Vasu
David T. Carter Entrance Scholarship
- Susanna Wong**
Edward Maitland Dunn Memorial Scholarship
- Jimmy Zhou**
Financial Literacy Competition Tuition Prize
- Jiahao Zhu**
Friar Luca Pacioli Entrance Scholarship
- Aili Huang**
Evelyn Huang
Annie Shi
You Chen Wang
Peiyao Zou
Friar Luca Pacioli Fellowship
- Jing Zeng**
Ives Family Entrance Scholarship
- Shephaine Shiu**
Karen Cheng Memorial Entrance Scholarship
- Gurlin Chudha**
Emily Gillespie
Xin Hu
Anran Liu
Saki Yamamoto
KPMG Entrance Scholarship
- Sandra Tung**
Linda Young Scholarship in Accounting and Finance

- Hardeep Begda**
Courtney Brown
Katherine Chan
Siyuan Cheng
Victoria Gibbings
Lloyd Carr-Harris Foundation Scholarship
- Yi Zhou**
Mary Ann Finn Entrance Scholarship
- Taylor Macdonald**
Noma Shareefdeen
Mary Rosenthal Entrance Scholarship
- Yi Xia**
Merrill Lynch Scholarship of Excellence in Accountancy Studies
- Kamaliot Dhaliwal**
Middleton Family Scholarship
- Damir Baizhiyenov**
Dakota Van De Byl
Morley Lemon Scholarship
- Lucas Chan**
Cathy Deng
Ummekulsum Jakda
Penelope Glasser Memorial Entrance Scholarship
- Bill Yeh**
Hera Tai
Richter Accounting Scholarship
- Xin Yu Xu**
Robert E. Gobeil Auditing Scholarship
- Shivam Dubey**
Thomas Hinsberger
Benjamin Jackson
Jennifer Kim
Effie Lai
Hilary Lai
Nancy Wang
Connor Williamson
Robert Harding – President’s Scholarship
- Yi-Hsuan Chen**
David Larbi
Robert Harding Entrance Scholarship
- Peter Drivas**
Laura Fong
Robert J. Sproule DECA Scholarship

- Uzma Nadir**
Robin K. Banks/Pacioli Entrance Scholarship
- Mobeen Malik**
Robin K. Banks/Pacioli Fellowship
- Tina Jin**
Robin K. Banks/Pacioli Scholarship
- Jun Park**
Rozeer Scholarship
- Rui Luo**
Russell Family Scholarship
- Tiffany Chow**
School of Accounting and Finance International Experience Award
- Onisifor Prisecaru**
School of Accounting and Finance Servant Leadership Scholarship
- Bo Lu**
Scotiabank Accounting Entrance Scholarship
- Cassandra Lee**
Yi Xia
Maggie Zhao
Shad Valley Alumni Entrance Scholarship
- Violet Ta**
Shawn Porter Entrance Scholarship
- Yilin Gao**
Jeff Lu
So Family Scholarship
- Jin Chu**
Esmat El-Bacha
Megan Moser
Elise Silcher
University of Waterloo – Waterloo County Entrance Scholarship

- Zhao Huang**
University of Waterloo Alumni @ Microsoft Entrance Scholarship in Mathematics
- Annie Chan**
University of Waterloo Alumni Scholarship
- Smit Patel**
Tobias Pushparajah
University of Waterloo Alumni@BDO Canada Scholarship
- Asad Reimoo**
University of Waterloo International Student Entrance Scholarship
- Aili Huang**
Upkar Arora School of Accounting and Finance Leadership Scholarship
- Russell Sweeney**
W.J. Schlatter Scholarship
- Mia Yang**
Carol Valerio Pena
Waterloo-Wellington Chartered Accountants Association Scholarship
- Hai Sui**
Waterloo-Wellington Chartered Accountants Association Work-Term Report Award
- Rebecca Ruan**
Guo Wang
Yu-Fen Wang
Whelan Entrance Scholarship
- Simeng Bai**
Claire Peng
William D. Packham Undergraduate Entrance Scholarship
- GRADUATE AWARDS**
MAcc
Jeffrey Wong
Anish Chopra Masters of Accounting Scholarship

- Bavithria Tharamanathan**
Bonnie Ho Memorial Award in Masters of Accounting
- Archana Chittella**
Shuyun Lai
Borys & Rose Boritz Accounting Graduate Scholarship
- Tarini Chandak**
Jiashu Zheng
Don Craig Memorial Award in Masters of Accounting
- Lai Rosanne**
John M. Harper & William J. Harper Scholarship
- Rosanne Lai** — First Place
Tommy Tam — Second Place
Adrienne Huen-Yee Chau — Third Place
The ISACA Toronto Research Paper Contest
- MTax**
Betty Xing
Canadian Tax Foundation Scholar Award
- Sean Hsu**
Sunny Jaggi
Donald & Geraldine Beam Award
- Anonymous**
Frank and Azniv Lochan Family Foundation Award
- Ananth Balasingam**
MTax Entrance Scholarship
- PhD**
Linda Whittaker
Kai Chen
John Waterhouse PhD Scholarship

SAF other awards and scholarships

- Gort Chong Family Award**
Stern Cohen Accountancy Studies Scholarship
Tax Executive Institute Scholarship
UWaterloo Alumni @ Ernst & Young Scholarship
Wescast Industries Award

AFM the fellowship program

The School of Accounting and Finance's Fellowship Program was established in 2003 and aims to recruit top students by providing them with opportunities to grow and develop, and recognize their successes and accomplishments.

Fellows begin to hone their communication and leadership skills by participating in our Ambassador Program and recruitment events in years 1 and 2. As upper-year students, Fellows have the opportunity to work directly in roles that compliment classroom and co-op learning experiences. In order to remain in the program, Fellows must maintain a high standard of academic excellence.

Each Fellowship is named after a distinguished alumnus known as an Honouree. Honourees are nominated to join the Fellowship Program and serve as a role model for the students in the program.

Supporters of the program

The School of Accounting and Finance in partnership with the support of generous donors established the Student Fellowship Endowment Fund in 2009. Every fellowship student receives an award of \$7,000 over the course of their 4 years of study. We are deeply grateful to the following individuals who have supported this fund.

Fellowship Partners

Gifts of \$50,000+

Steve (PhD 1978) and Vera (BA 1978) Aldersley
 Betty Ann Jarrett, CPA, CA, MAcc
 Doug McPhie, FCPA, FCA
 Karen Wilkinson, FCPA, FCA
 EY (alumni matching fund)

Fellowship Supporters

Gifts of \$25,000+

Steven Glover, BMath, FCPA, FCA
 Jay Hutchison
 George Prieksaitis and Asa H. Sjoberg

Fellowship Friends

Gifts of \$10,000+

Bruce Ball, FCPA, FCA
 Eoin Brady
 Ken (BA 1994) and Anita (BMath 1994) Buttenham
 Janice Deganis
 Ian Gunn
 José Hernandez, CPA, CA
 Dennis Johnson
 Nicole Rayner (Genore), MAcc 1997
 Tim Rickert
 Tracey Riley, CPA, CA, CISA (BA 1988)

Nominations of University of Waterloo alumni who exemplify the spirit of the program are welcome. Please contact **Alex Lippert**, allipper@uwaterloo.ca to submit your nominations.

AFM 2015 fellows

Damir Baizhiyevov » The Ashish Kapoor Fellow

Ashish Kapoor, MAcc 2000, CFA, CPA, CA
 SimKap Advisory Corp.

Ioana Balta » The Ken Kember Fellow

Ken Kember, MAcc 1990, CPA, CA
 Export Development Canada

Hardeep Begda » The Paul Langill Fellow

Paul Langill, MAcc 1991, CPA, CA
 TD Securities Inc.

Cindy Chen » The Doug Johnson Fellow

Doug Johnson, MAcc 1985, CACM
 Equity Financial Trust

Ben Jackson » The Kursat Kacira Fellow

Kursat Kacira, BMath 1994, CPA, CA
 Maplewood International REIT

Anna Jia » The Teresa Chang Fellow

Teresa Chang, MAcc 2003, CPA, CA
 deKEFIR

Qhalisa Khan » The Keith Farlinger Fellow

Keith Farlinger, BMath 1977, CPA, CA
 BDO International Limited

Anran Liu » The Barb Rockx Fellow

Barb Rockx, MAcc 1987, CPA, CA
 Barb Rockx Chartered Accountants

Rachel Motomura » The Colin De Souza Fellow

Colin De Souza, MAcc 1990, CPA, CA, CMA
 BMO Financial Group

Ana Rusu » The Elaine Lee Fellow

Elaine Lee, BA 2003, CPA, CMA, DTM
 The Alcohol and Gaming Commission of Ontario

Fineas Tatar » The Frank Lochan Fellow

Frank Lochan, MTax 2002
 Karma Industries Limited

Bianca Vasu » The Ingrid Bett Fellow

Ingrid Bett, MAcc 1989, CACM
 Dare Foods Limited

Matthew Watson » The Jessica Chiu Fellow

Jessica Chiu, MAcc 2004, CPA, CA
 TD Bank Group

Julia Wei » The Julia Klann Fellow

Julia Klann, MAcc 2005, CA, CPA
 KPMG

Jessica Yu » The Vlad Moisseikin Fellow

Vlad Moisseikin, MAcc 2008, CPA, CA, CBV
 Ontario Teacher's Pension Plan



AFM 2014 fellows

*Muneeb Ahmed » The Rod Barr Fellow

Rod Barr, BA 1969, FCPA, FCA

*Asees Bhullar » The Jane Ritchie Fellow

Jane Ritchie, MAcc 1987, CPA, CA, CMA
Ritchie Shortt & Tully, LLP, Chartered Accountants

Courtney Brown » The Victoria Davies Fellow

Victoria Davies, MAcc 1988, CPA, CA, CMA, FCMA
Lee Hecht Harrison Knightsbridge

*Tiffany Chan » The Pamela Steer Fellow

*Pamela Steer, MAcc 1994, CPA, CA
WSIB

Zhao Annie Chen » The Colleen Haney Fellow

Colleen Haney, MAcc 2000, CPA, CA
Fongo

Si Sophie Chen » The Krista Heuston Fellow

Krista Heuston, MAcc 1993, CPA, CA
Sun Life Financial

*Shraddha Cherukuri » The Cindy Kottoor Fellow

*Cindy Kottoor, MAcc 1997, CPA, CA
Neverest Inc.

Haileigh Duplantis » The Ken Newport Fellow

Ken Newport, MAcc 1988, CPA, CA

Brielle Huang » The Brian Leader Fellow

Brian Leader, BA 1975, FCPA, FCA
Chartered Professional Accountants of Ontario

Jasper Lam » The Lynda Sullivan Fellow

Lynda Sullivan, BMath 1982, FCPA, FCA
Manulife Financial

Jasmine Lee » The Janice Deganis Fellow

Janice Deganis, BA 1990, CPA, CA, CMA, LPA,
CPA (Illinois)
EY

Xin Michelle Li » The Terie Chan Fellow

Terie Chan, MAcc 2008, CPA, CA, CBV
Deloitte

Michelle Li » The Jerry Whelan Fellow

Jerry Whelan, BMath 1976, FCPA, FCA, CISA
PwC

*Tianjia Teresa Li » The Kevin Elop Fellow

Kevin Elop, MAcc 1989, CPA, CA
Accelerator Centre

Megan Moser » The Jeannine LiChong Fellow

Jeannine LiChong, MAcc 1992, CPA, CA
Gluskin Sheff + Associates

Simran Natt » The Cindy Ditner Fellow

Cindy Ditner, MAcc 1986, CPA, CA, CMA, FCPA, FCA
BDO Canada

*Andres Perez-Vilarino » The David Cates Fellow

*David Cates, MAcc 2005, CPA, CA
Denison Mines Limited

*Rhea Pinto » The Christine Draper Fellow

Christine Draper, BA 1993, CPA, CA
Thales Group

*Amanda Pokhoy » The Chris Cupidio Fellow

Chris Cupidio, BMath 1992, CFA
Morningstar Canada

Anirudh Puri » The Paul Battista Fellow

Paul Battista, MAcc 1987, CPA, CA
EY

Rabani Sawhney » The Andrew Dunn Fellow

Andrew W. Dunn, MAcc 1987, FCPA, FCA
Canadian Shield Capital

Alexandra Sharr » The George Prieksaitis Fellow

George Prieksaitis, BMath 1994, CPA, CA, LPA,
CPA (Illinois)
EY

Ram Subbiah » The Tim Rickert Fellow

Tim Rickert, BMath 1993, CPA, CA, CBV
BDO Canada

Jacqueline Sue » The Kerry Schwichtenberg Fellow

Kerry Schwichtenberg, MAcc 1988, CPA, CA
Deloitte

*Ethan Tang » The Brad Ebel Fellow

*Brad Ebel, BMath 1983, CPA, CA, CFE, CFF
MDD Forensic Accountants

Catherine Tchang » The Sepanta Dorri Fellow

Sepanta Dorri, MAcc 1997, CPA, CA
Teranga Gold Corporation

*Carol Valerio Pena » The Ashi Mathur Fellow

Ashi Mathur, MAcc 1993, CPA, CA
BMO Capital Markets

*Christopher Wong » The Russell French Fellow

*Russell French, MAcc 1995, CPA, CA
BDC

Linda Zhang » The Brandon Weekes Fellow

Brandon Weekes, MAcc 2005, CPA, CA
Deloitte

*Indicates new Fellows and Honourees

AFM 2013 fellows

Abhishek Chakrabarty » The Tim Forristal Fellow

Tim Forristal, MMath 1975, CPA, CA

Katherine Chan » The An Lam Fellow

An Lam, MAcc 2000, CPA, CA
Deloitte

Surbhi Garg » The Tony Ancimer Fellow

Tony Ancimer, MAcc 1993, CPA, CA
Deloitte

Kevin Li » The Will Xiang Fellow

Will Xiang, MAcc 2009, CITP, CPA, CA
Crowe Horwath Global Risk Consulting

Xue Leng » The Benjie Thomas Fellow

Benjie Thomas, PDAcc 1998, CPA, CA
KPMG

Anqi Liu » The Michelle Wettlaufer Fellow

Michelle Wettlaufer, MAcc 1989, CPA, CA, CMA

Ismail Mian » The Joseph Wilke Fellow

Joseph Wilke, BA 1992, CPA, CA
Husky Injection Moulding System

Sumaiya Najarali » The Dennis Tew Fellow

Dennis Tew, MAcc 1993, CPA, CA, CFP, CPA (US)
Franklin Templeton Investments Corp.

Kim Nguyen » The Steve McBoyle Fellow

Steve McBoyle, BA 1993, MBA, CPA, CA, CPA (US)
Royce and Associates

Aashish Pappu » The Mike Abbott Fellow

Mike Abbott, BMath 1983, CPA, CA
ADFLOW Networks

Prem Patel » The Daniel Im Fellow

Daniel Im, MAcc 2001, CPA, CA, JD
Adriana Resources Inc.

Samantha Pendon » The Jay Chai Fellow

Jay Chai, MAcc 2000, CPA, CA
Deloitte

Julia Tang » The Karen Wilkinson Fellow

Karen Wilkinson, MAcc 1990, FCPA, FCA
Deloitte

Samantha Tjong » The Jeff Good Fellow

Jeff Good, MAcc 2000, CPA, CA•IFA, CFE
Public Works and Government Services Canada

Elizabeth Vachon » The Chuck Ormrod Fellow

Chuck Ormrod, BMath 1982, CPA, CA
KPMG

Louis Ming Wong » The Aazar Zafar Fellow

Aazar Zafar, MAcc 1999, CPA, CA, CFA
OP Trust

Alda Wu » The Spencer Bibby Fellow

Spencer Bibby, MAcc 1999, CPA, CA, FRM
BMO Bank of Montreal

Hammad Shams » The Wayne Adams Fellow

Wayne Adams, BMath 1977
Canadian Tax Foundation

Julia Jinhui Shen » The Charles Knight Fellow

Charles Knight, BA 1979, CPA, CA
Deloitte

Jialing Wu » The Allan Brett Fellow

Allan Brett, BA 1991, CPA, CA, CBV
Descartes

Kirstin Xie » The Sandra Licata Fellow

Sandra Licata, BA 1994, CPA, CA
Hamilton Health Services

Joy Yang » The Jesse Waltman Fellow

Jesse Waltman, MAcc 2005, MBA, CPA, CA
Sutton Compliance Communications

Kevin Zhao » The Upkar Arora Fellow

Upkar Arora, MAcc 1985, CPA, CA, CMA
Illumina Partners

Grace Zhou » The Sharon Ng Hayes Fellow

Sharon Ng Hayes, MAcc 2009, CPA, CA
The Hudson's Bay Company

Jack Zhou » The Wayne Dunkel Fellow

Wayne Dunkel, BMath 1993, CPA, CA, CFP
BDO Canada

Thank you to each and every one of our Alumni Honourees for their commitment to ensure that our student fellows have the best opportunity to become outstanding leaders and future professionals.

AFM 2012 fellows

Sherry Au » The Jo Anne Bagnall Fellow

Jo Anne Bagnall, BMath 1982, CPA, CA, CRMA
OSFI

Jasmit Bhatti » The Brian Ma Fellow

Brian Ma, MAcc 2008, CPA, CA
Wesdome Gold Mines

Rosia Chen » The Sarah Netley Fellow

Sarah Netley, MAcc 2009, MTax 2012, CPA, CA
Collins Barrow

Sophia Chen » The Mike Dutot Fellow

Mike Dutot, BA 1979, ACIS, FCPA, FCMA
The Dow Chemical Company

Stephen Chen » The Dale Schneider Fellow

Dale Schneider, BMath 1993, CPA, CMA
Linamar Corporation

Jennifer Chen » The Tracy Elop Fellow

Tracy Elop, MAcc 1989, CPA, CA
KidsAbility

Alan Cheung » The George So Fellow

George So, BA 1994, CPA, CA
Kindle Capital Management

Susan Fortney » The John Gallinger Fellow

John Gallinger, MAcc 1997, CPA, CA
The Gallinger Group

Victoria Gibbings » The Nora Murrant Fellow

Nora Murrant, BMath 1973, FCPA, FCA, FCBV

Mary Kate Gleason » The Ben Kaak Fellow

Ben Kaak, BA 1982, CPA, CA
KIK Custom Products

Hasanain Habib-Nayany »

The Jay Hutchison Fellow

Jay Hutchison, MAcc 1992, CPA, CA
EY

Karen Hsu » The Shikha Gandhi Fellow

Shikha Gandhi, MAcc 2004, CPA, CA
Deloitte

Trishia Rae Jamison »

The Sara Yamotahari Fellow

Sara Yamotahari, BMath 1992, CPA, CA
EY

Adnan Khan » The Jocelyn Blanchet Fellow

Jocelyn Blanchet, MAcc 2000, CPA, CA
KPMG

Anna Liang » The Jayme Yeung Fellow

Jayme Yeung, MTax 2003, CPA, CA, CPA (US)
PwC Canada

Alice Lin » The Justin Park Fellow

Justin Park, MTax 2005, CPA, CMA, CFP
KPMG

Annie Lu » The Lynn Wilson Fellow

Lynn Wilson, BMath 1982, MEd, CPA, CA
EY

Anna Ng » The Bruce Ball Fellow

Bruce Ball, BMath 1984, FCPA, FCA, CFP, TEP
BDO Canada

Edbert Oey » The Andrew Shin Fellow

Andrew Shin, MAcc 1997, CPA, CA, CA•IFA, CBV
RBC

David Ou » The Glenn Ives Fellow

Glenn Ives, BMath 1984, FCPA, FCA
Deloitte

Nimesh Ratnarajah » The Mike Williams Fellow

Mike Williams, BAsc 1987, MTax 2002, MBA,
P. Eng., CFA
Independent Accountants' Investments Counsel

Julian Wong » The Steve Baker Fellow

Steve Baker, MAcc 1987, CPA, CA, CMA
Union Gas

Adam Yan » The Greg McIntosh Fellow

Greg McIntosh, MAcc 1996, CPA, CA
Iron Mountain

Bill Yeh » The Gavin Swartzman Fellow

Gavin Swartzman, MAcc 1988, CPA, CA
Peerage Realty Partners

Lillian Ying » The Suzanne Patfield Fellow

Suzanne Patfield, BA, PDAcc 2003, CPA, CA
Ontario Universities' Application Centre

Anna Zuo » The Jennifer Fiddian-Green Fellow

Jennifer Fiddian-Green, BA 1994, CPA, CA•IFA, CAMS, CFI, CFE
Grant Thornton

AFM 2011 graduating fellows

Dean Ah Sen » The Eric Borromeo Fellow

Eric Borromeo, MAcc 1990, CPA, CA, CFA
Wells Fargo Bank, N.A., Canadian Branch

Mariam Azhar » The Karen Atkinson Fellow

Karen Atkinson, BMath 1992, CPA, CA
EY

Fannie Cai » The Margaret Shackell-Dowell Fellow

Margaret Shackell-Dowell, MAcc 1990, PhD, CPA, CA
Cornell University, Johnson Graduate
School of Management

Wendy Cai » The Cynthia McIntyre Fellow

Cynthia McIntyre, MAcc 1996, CPA, CA
EY

Shuxin Cao » The Margo Longwell Fellow

Margo Longwell, BMath 1987, CPA, CA
Canadian Public Accountability Board

David Chan » The Russ Weir Fellow

Russ Weir, BMath 1985, CPA, CA
BDO Canada

Oliver Chan » The John Wonfor Fellow

John Wonfor, BMath 1985, FCPA, FCA
BDO Canada

Alice Cheng » The Laura Da Re Fellow

Laura Da Re, BMath 1994, CPA, CA
Canadian Broadcasting Corporation

Blythe Chik » The Dianne McMullen Fellow

Dianne McMullen, BMath 1984, FCPA, FCA, CFP
BDO Canada

Tiffany Chung » The Anish Chopra Fellow

Anish Chopra, MAcc 1994, CPA, CA, CFA, CBV
TD Asset Management

Jeanette Cyr » The Nancy Lala Fellow

Nancy Lala, MAcc 1986, CPA, CA, CMA, ICD.D
About Communications

Mayank Gupta »

The Nicole D'Souza Russell Fellow

Nicole D'Souza Russell, MAcc 1999, CPA, CA, CPA (US)
Bell Mobility

Jennifer Lai » The John Gort Fellow

John Gort, BA 1993, CPA, CA, CFA
InstarAGF Asset Management Inc.

Michael Leung » The Scott Shannon Fellow

Scott Shannon, MAcc 1990, CPA, CA, CMA, CBV
Grant Thornton

Koren Leung » The Aly Hadibhai Fellow

Aly Hadibhai, MAcc 2003, MBA, CPA, CA, CFA
ONCAP Management Partners

Sanly Li » The Betty Ann Jarrett Fellow

Betty Ann Jarrett, MAcc 1986, CPA, CA
PwC Canada

Ambrose Liu » The Jai Shah Fellow

Jai Shah, MAcc 1990, CPA, CA, CMA, CPA (US)
MASCO Corporation

Onisifor Prisecaru » The Geoff Hayes Fellow

Geoff Hayes, MAcc 2004, CPA, CA
KPMG

Rida Raza » The Dave Middleton Fellow

Dave Middleton, BMath 1984, CPA, CA•IT,
CFA, CPA (US)
Middleton Family Office

Susan Wang » The Alexandra Hardy Fellow

Alexandra Hardy, MAcc 1999, CPA, CA
BDO Canada

Tiffany Wong » The Bryan Lee Fellow

Bryan Lee, BMath 2008
Scotiabank Global Banking and Markets

Lynn Wu » The Gord Kilpatrick Fellow

Gord Kilpatrick, MAcc 1992, CPA, CA
Talon Partners

Rebecca Yao » The Chester Dawes Fellow

Chester Dawes, BMath 1999, PDAcc, CPA, CA, CPA (US), CFA
Catalyst Capital Group Inc.

Lucy Yao » The Juli-ann Gorgi Fellow

Juli-ann Gorgi, MAcc 2003, CPA, CA
Chartered Professional Accountants of Canada

Maggie Zhao » The Cristina Shortt Fellow

Cristina Shortt, MAcc 1987, CPA, CA, CMA, CFP
Ritchie, Shortt, & Tully, Chartered Accountants

Jessica Zheng » The Hannah Chow Fellow

Hannah Chow, MTax 2002, CPA, CA
Sadhra & Chow LLP

Connie Zhou » The Cindy Veinot Fellow

Cindy Veinot, MAcc 1991, FCPA, FCA, CMA,
CPA (US)
Deloitte

AFM fellowship society

The Fellowship Society recognizes Fellows and Honourees who have participated in the Fellowship Program.

AFM fellows

Hector Abullarade Gamez, MAcc '12
Akua Acheampong, MAcc '11
Nilofer Ahmed, MAcc '12
Kimberly Aitken, MAcc '11
Thanushan Ananthakumar, MAcc '14
Catalina Anghel, MAcc '12
Anubha Arora, MAcc '08
Vicky Au, MAcc '10
Dinesh Balakrishnan, MAcc '14
Aditya Bansal, MAcc '15
Varun Bhambhani, MAcc '14
Cody Buchenauer, MAcc '14
Shazma Butt, BAFM '14
David Catarino, MAcc '08
Kalpita Chakrabarty, MAcc '13
Melissa Chan, MAcc '13
Cynthia Chan, MAcc '12
Amy Chan, MAcc '01
Matthew Chan, MAcc '11
Tarini Chandak, MAcc '15
Adrienne Chau, MAcc '15
Gladys Chau, MAcc '13
Min Che, MAcc '15
Xuan (Annie) Chen, MAcc '15
Annie Jing Jia Chen, MAcc '12
Mei Chen, MAcc '12

Miranda Chen, MAcc '10
Mandy Cheng, MAcc '12
Samantha Cheung, MAcc '15
Jennifer Cheung, MAcc '14
Precilla Cheung, MAcc '13
Tak-Lan Chin, MAcc '10
Stephanie Ching, MAcc '10
Joseph Chiu, MAcc '15
Irvin Choo, MAcc '11
Joanne Chow, MAcc '08
Mary Chu, MAcc '10
Dylan Corey, MAcc '14
Alex Daharu, BAFM '12
Jai Dhir, MAcc '14
Kendra Domenicucci, MAcc '15
Ellen Dong, MAcc '09
Gigi D'Souza, MAcc '13
Jeanne Du, MAcc '08
Jessica Everest, MAcc '09
Stephanie Gates, MAcc '09
Mirna Gerges, MAcc '11
Jason G. Gong, BAFM '14
Jody Grewal, MAcc '11
Xin Yue (Sherry) Gu, MAcc '11
Ian Gutwinski, MAcc '12
David Ha, MAcc '09

Amanda Halverson, MAcc '15
Ye Han, MAcc '11
Brooke Hancock, MAcc '09
Carolyn Harriss, MAcc '12
Reece Hiland, MAcc '10
Chloe Hong-Yiu Ho, MAcc '14
Billy Ho, MAcc '13
Zac Hogg, BAFM '14
Syed Jafri, MAcc '14
Ismat Jahan, MAcc '11
Gurnasheen Kalkat, MAcc '14
Eric Kam, MAcc '10
Akash Kapoor, MAcc '14
Manav Kapoor, MAcc '13
Rita Kwan, MAcc '15
Simon Kwan, BAFM '10
Kevin Lai, MAcc '15
Jannie Lam, MAcc '14
Grace Lam, MAcc '95
Linda Lam, MAcc '13
Carrie Kar Yee Lau, MAcc '12
Jonathan Cheuk-Hank Lau, MAcc '12
Desmond Lau, MAcc '08
Hoi-Yan Mille Law, MAcc '11
Richard Le Page, MAcc '10
Andrew Leung, MAcc '14

Howard Leung, BAFM '14
Christine Leung, MAcc '11
Laurence Leung, MAcc '10
Iris Leung, MAcc '08
Angela Li, MAcc '13
David Lin, MAcc '09
Siyan Jennifer Liu, MAcc '14
Brian Liu, MAcc '13
Shuk-Laam Lo, MAcc '12
Raymond Lu, MAcc '13
Matthew Lui, BAFM '14
Steven Ly, MAcc '11
Stefan Mak, MAcc '15
Alexander Manoukian, MAcc '14
Alicia McTaggart, MAcc '08
Jeffrey Mo, MAcc '14
Kundavi Mohanraj, MAcc '15
Elizabeth Mok, MAcc '15
Natalie Muzyczka, BAFM '08
Marco Ng, BAFM '15
Christina Ng, MAcc '12
Karen Ngai, BAFM '10
Phi Nguyen, MAcc '13
Saem Ok, MAcc '11

Talha Omer, MAcc '14
Gavin Pereira, MAcc '13
Kristan Pielt, MAcc '08
Deanna Yimin Qi, MAcc '13
Yuwei Ren, MAcc '10
Hanna Roohi, MAcc '13
Sharjil Salim, MAcc '12
Armitish Sethna, MAcc '13
Milan Shah, MAcc '12
Rajan Shah, MAcc '09
Roanna Shen, BAFM '14
Malathi Sriskandha, MAcc '14
Bridget Stockie, MAcc '09
Jonathan Sue, MAcc '10
Vivian Sy, MAcc '14
Gloria Tai, MAcc '10
Sherlaine Tai, MAcc '08
Brian Tang, MAcc '10
Gigi Tat, MAcc '08
Betty Tien, MAcc '10
Jennifer Trian, MAcc '15
Robert Tutins, MAcc '11
Nadia Veira, MAcc '11
Suneethi Viswanathan, MAcc '13

Li (Haylin) Wang, MAcc '15
Sunny Zhongyang Wang, BAFM '14
Meng Wang, MAcc '12
Lucy Wang, MAcc '10
Bo Wang, MAcc '09
Ian Weng, MAcc '13
Jeffrey Wong, MAcc '15
Tiffany Wong, MAcc '08
Lucy Xie, MAcc '13
Tian Li Xie, MAcc '11
Wendy Yang, MAcc '15
Lily Ye, BAFM '10
Joyce Yim, MAcc '15
Macy Yim, MAcc '15
Michael Yip, MAcc '13
Michelle Yun, MAcc '13
Mary (H. Q.) Zhang, BAFM '15
Mary (K.) Zhang, MAcc '15
Helen Yue Zhang, MAcc '14
Nina Meng Zhang, MAcc '14
Cindy Bei Bei Zhang, MAcc '14
Julia Zhou, MAcc '09
Emily Zhu, MAcc '11

Jay Chai, MAcc '00
Barbara Chiu, MAcc '91
Jessica Chiu, MAcc '04
Derek Chu, MAcc '05
Ben Cornell, BA '76
***Don Craig**, BMath '74
Bill Cummings, MAcc '89
Mike Dean, BMath '92
Janice Deganis, BA '90
Elizabeth Demers, MAcc '90

AFM honourees

Janet Ainslie, MAcc '91
Steve Aldersley, PhD '78
Bryan Alldred, MAcc '04
Howard Armitage Former SAF Director
Upkar Arora, MAcc '85
Sean Bailey, BA '96
Rod Barr, BA '69
Andy Bauer, PhD '12
Tim Bauer, PhD '12

Spencer Bibby, MAcc '99
Eric Borromeo, MAcc '90
Carrie Boutcher, MAcc '92
Brenda Brazier, MAcc '87
Donald Brazier, MAcc '87
Laura-Lee Brenneman, MAcc '04
Marrianne Bridge, BMath '81
Benita Brown, MAcc '04
***David T. Carter**, Former SAF Faculty
Joe Catalfamo, MAcc '86

*deceased

AFM honourees

Cindy Ditner, MAcc '86
Christine Donaldson, BMath '89
Diana Dunlop, MAcc '02
Andrew Dunn, MAcc '87
John Eadie, BMath '77
Mark Eamer, MAcc '95
Len Eckel, Retired professor
Pam Egan, BA '87
Kevin Elop, MAcc '89
Tracy Elop, MAcc '89
Keith Farlinger, BMath '77
Mary Jo Fedy, MAcc '88
Glenn Feltham, PhD '95
Jennifer Fiddian-Green, BA '94
David Forster, BMath '79
Teresa Fortney, BMath '86
Shikha Gandhi, MAcc '04
Mike Garvey, BA '69
Steve Glover, BMath '75
Jeff Good, MAcc '00
John Gossling, BMath '89
Chris Govan, MAcc '93
Ken Grondin, MAcc '86
Jack Hanna, Former SAF Director
Bob Harding, BMath '80
Alexandra Hardy, MAcc '99
Geoff Hayes, MAcc '04
Ed Henderson, BA '86
Jose Hernandez, MAcc '98
Krista Heuston, MAcc '93
Eric Hirst, MAcc '85
Kris Hoang, MAcc '04
Quoc Hoang, MAcc '03
Angela Holtham, BMath '72
Tiffany Hu, MAcc '06

Suzanne Hubbard, BA '92
Alison Jackson, MAcc '97
Hurb Jackson, MAcc '85
Tim Jackson, BA '92
Betty Ann Jarrett, MAcc '86
Doug Johnson, MAcc '85
Ken Klassen, MAcc '89
Jim Kopperson, MAcc '91
Susan Krische, MAcc '93
Priya Kurian, MAcc '04
Adam Laiken, MAcc '04
Tushaar Lakhotia, MAcc '06
Darko Lakota, MAcc '98
Paul Langill, MAcc '91
Shana Laurie de Hernandez, MAcc '98
Brian Leader, BA '75
Carol Leamnan, MAcc '89
Ohad Lederer, MAcc '99
Elaine Lee, BA '03
Morley Lemon, Former SAF Director
Theresa Libby, PhD '96
Cary List, BMath '85
Jodie Lobana, MAcc '98
Margo Longwell, BMath '87
Christy MacDonald, PhD '09
Tracy Mann, MAcc '94
Alister Mason, Former SAF Director
Angela McNeill, MAcc '94
Doug McPhie, BES '78
Devan Mescall, PhD '07
Fedrica Nazzani, MAcc '95
Sabrina Nazzani, MAcc '95
Jim Nesbitt, MAcc '89
Sharon Ng Hayes, MAcc '04
Robert O'Connor, BMath '88

Alek Olsen, Retired professor
Chuck Ormrod, BMath '82
Suzanne Patfield, BA '03
Larry Patterson, BMath '76
Jill Pletsch, MAcc '00
Shawn Porter, MAcc '88
Donna Psutka, BMath '80
Sue Reibel, BMath '88
Tracey Riley, BA '88
Julie Robson, MAcc '92
Dan Rogozynski, MAcc '92
Tim Rollins, MAcc '96
David Rozee, BMath '88
James Schlegel, MAcc '92
William Scott, Retired professor
Amit Seth, MAcc '02
Margaret Shackell, MAcc '90
Cristina Shortt, MAcc '87
Jill Stewart, MAcc '92
Kevin Strain, MAcc '90
Cindy Veinot, MAcc '91
Jesse Waltman, MAcc '05
Bruce West, BMath '80
Scott Wetmore, BMath '78
Jerry Whelan, BMath '76
Christine Wiedman, MAcc '88
Karen Wilkinson, MAcc '90
Lynn Wilson, BMath '82
Tim Wilson, MAcc '99
Roger Witteveen, MAcc '93
Catherine Wong, MAcc '06
Norbert Woo, MAcc '02
Norman Woo, MAcc '01

SAF alumni association history

University of Waterloo School of Accounting and Finance Alumni Association

The Alumni Association was formed in September 1983, where alumnus Mike Garvey (BA '69) was named Founding President. The Association played a direct role in helping advance the School's vision, and developed a mandate and range of activities that are still maintained.

Today, the objectives of the Association are to:

- » Promote and facilitate the mission and goals of the School of Accounting & Finance and the University of Waterloo
- » Provide opportunities for alumni to be connected, informed and actively involved in the life of the school, its students and alumni
- » Promote awareness among the business community, the public and the accounting and finance professions, of the accomplishments and needs of the School and the University
- » Aid in the successful educational experience of current students

Thank you to our dedicated alumni who have served as members of the Alumni Association!

2015 Executive Members:
Jesse Waltman, MAcc '05, President
Elaine Lee, BA '03, Incoming President
Gavin Swartzman, MAcc '88, VP, Connections & Events
Vlad Moisseikin, MAcc '08, VP, Finance & Administration

2015 Committee Members:
 Rommel Acob, MAcc '08
 Jessica Chiu, MAcc '04
 Victoria Davies, MAcc '88
 Cindy Ditner, MAcc '86
 Ian Gutwinski, MAcc '12
 Gordon Ho, MAcc '08
 Kieng Iv, MAcc '11
 Vithushan Jeyakumaran, BMath '14
 Shawn Pharasi, MAcc '09
 Nitish Sharma, BMath '14
 Caroline Zhang, BMath '12








AWARDS DINNER

2015 | SCHOOL OF ACCOUNTING AND FINANCE



EDUCATION THAT MATTERS: UNDERSTAND, APPLY, INTEGRATE



-  @UWSAFAlumni
-  School of Accounting and Finance Alumni Official Group
-  School of Accounting and Finance — Alumni and Friends

200 UNIVERSITY AVENUE WEST, WATERLOO, ON, CANADA N2L 3G1
519-888-4567, EXT. 36536 | FAX: 519-888-7562 | uwaterloo.ca/saf



UNIVERSITY OF
WATERLOO