

AWARDS 2016 | SCHOOL OF ACCOUNTING AND FINANCE DINNER

IDEAS START HERE

THURSDAY, NOVEMBER 10, 2016

6:00 RECEPTION | 6:45 FORMAL PROGRAM

ARCADIAN COURT | TORONTO



UNIVERSITY OF
WATERLOO

WATERLOO

SAF

masters of ceremonies



Adnan Khan

Adnan is finishing his fourth year in the AFM program. He has benefited from the support and guidance of numerous SAF alumni and faculty. During his time in university, he has been involved with a variety of finance initiatives including the

Student-run Investment Fund, CFA Institute Research Challenge, and private equity-focused research with Professor Steve Balaban. Adnan is currently involved with a not-for-profit organization called EduGate that is focused on bringing education technology to rural communities in Latin America. After graduating, he plans to join a squash league, act in a play, and spend a month in Nicaragua. Adnan was the recipient of the 2013 Marley Lemon Scholarship and the 2016 School of Accounting and Finance Servant Leadership Scholarship.



Lynn Wu

Lynn graduated this past year from the Masters of Accounting (MAcc) and AFM programs. During her time in university, she was involved in many organizations such as the Young Tax Professionals group and David T. Carter Financial Review team.

As a member of SAF's student competition teams, Lynn and her peers placed second in the Accounting Division at the 2015 Schulich RISE Competition. In the same year, Lynn served as President of the School's Accounting and Finance Student Association (AFSA). She currently works full time in tax at Deloitte in Ottawa. During her time off, she enjoys cooking, travelling, and curling. Lynn was the recipient of the 2012 SHAD Valley Alumni Entrance Scholarship.



SAF director's
message

Welcome and thank you for attending the 13th Annual SAF Awards Dinner in Toronto. Tonight we celebrate success with our donors and supporters, faculty and friends, honourees and fellowship students, scholarship recipients, student and alumni associations, alumni award winners, and a very special retirement honour. We are immensely grateful for your continued involvement and on-going support.

This year, the School bids a fond farewell to faculty member, Grant Russell. For more than 40 years, Grant has contributed significantly to the development of the School. Grant was present for the original creation of the 'Accounting Group' at Waterloo and has since developed, collaborated, and enhanced a host of initiatives in education, many of them wide ranging and transformative. We are deeply grateful for Grant's commitment to the School and profession, and for his tireless engagement with, and concern for, students.

In 2016, the School has expanded experiential learning opportunities with the establishment of the SAF Finance Lab and expansion of the Student-run Investment Fund. Additionally, the School reached new global heights capturing the CFA Investment Research Challenge world championship in April. A tribute to everyone involved in this well-deserved victory — our students and their peers, faculty, industry advisors, scholarship donors and co-op employers.

Congratulations to our 2016 Alumni Award Winners — Tim Jackson and Hamoon Ekhtiari.

As the School continues to progress and innovate, we are appreciative for your friendship. Thank you for joining us and I look forward to sharing news and updates with you throughout the year.



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



AWARDS
2016 | SCHOOL OF ACCOUNTING AND FINANCE
DINNER

For more than 40 years, Grant's vision and leadership contributed significantly to the School's success, growth and global reputation. When asked what kind of retirement tribute would mean the most to him, Grant immediately replied, "helping the students."

— Thomas Scott

SAF 2016 SAF alumni achievement award winner

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



Tim Jackson, BA 1992, CPA, CA »

Tim Jackson, President and CEO of SHAD, a Canadian charitable not-for-profit organization that helps exceptional high school students recognize and envision their full potential as tomorrow's leaders. Most recently Tim was the lead Executive at MaRS Centre for Impact Investing.

In prior years, Tim held leadership roles at the University of Waterloo as the Vice President of University Relations, the CEO of the Accelerator Centre, and the Associate Vice-President of Commercialization.

Tim also has a long history as an entrepreneur and has been involved with Social Venture Partners Waterloo Region, Tech Capital Partners, PixStream and numerous other technology companies.

Tim is an SAF Honouree and has received the University of Waterloo's 50th Anniversary Alumni Award and as well as being honoured with the Governor General's Caring Canadian Award. In his professional life, he has received the Institute of Chartered Accountants of Ontario's Award of Distinction in 2009 and was named a Fellow (FCA), the highest designation within the Institute.

Tim has been and is currently involved in a number of boards and is a frequent speaker on innovation, corporate culture, leadership, community building, acquisitions and investing, and related topics.

A Waterloo grad, Tim holds a BA in Accounting from the University of Waterloo and is a CPA, CA. Tim continues to be involved with the University and the School of Accounting and Finance in many ways including lecturing at the Conrad Business, Entrepreneurship and Technology Centre. Tim is connected to the SHAD Waterloo Innovation Challenge Scholarship.

SAF 2016 young alumni award winner

The School of Accounting and Finance Young Alumni Award recognizes an alumnus who has distinguished themselves through their professional achievements, community involvement and public service, and has graduated in the last 10 years or is 35 years of age or younger.



Hamoon Ekhtiari, BMath 2009, MAcc 2009, CPA, CA »

A lover of all things blueberry and/or avocado, Hamoon Ekhtiari is currently the Director of Strategy and Innovation for the Executive Vice President at TELUS.

Previously, he was the Founding Director of Studio [Y], a leadership and innovation academy at MaRS, Canada's largest innovation hub. Hamoon has also founded a social enterprise which raised \$1 million in its first year, helped build Deloitte's consulting business in the Caribbean, and taught as an adjunct faculty member.

Hamoon is a member of the Governor General's Canadian Leadership Conference, a Rothschild Fellow at the University of Cambridge, a recipient of the University of Waterloo's Faculty of Math 2015 Alumni Achievement Medal, and a Canada Millennium Scholar.

Through his most recent venture, Audacious Futures, Hamoon works with leaders and innovators across sectors and around the world on breakthrough innovation, transformation, impact, and re-imagining the future. Hamoon was the recipient of the 2010 John M. Harper and William J. Harper Graduate Scholarship.

To nominate SAF alumni or for additional information, please contact **Alex Lippert**, Sr. Alumni and Development Officer at allipper@uwaterloo.ca; or 519-888-4567, ext. 38227.

**SAF**

Grant Russell's accomplishments

"An institution is the reflection of the people who guide it," observed industrial giant Walter P. Chrysler. Today, the School of Accounting and Finance reflects the efforts of many people, none more so than Grant Russell, whose significant contributions have been essential to building the School's enviable reputation.

"Who you are, and what you are capable of — these are important questions," said Russell, when promoting the professional student concept. The ability of every member of the School to answer this question well and with pride, today and into the future, has been immeasurably strengthened through Grant's many contributions.

Highlight of Grant's major accomplishments:

- » In 1979, Grant Russell, Robin Banks, and Jack Hanna became catalysts for ground-breaking developments by founding the original "Accounting Group" — the modern day School of Accounting and Finance.
- » The Centre for Accounting Ethics was established by Grant Russell, Sally Gunz, Morley Lemon, Efrim Boritz, David Carter, and Gordon Richardson to improve the teaching of ethics, to impact the conduct applied in research, and to enhance professional judgement.
- » Grant implemented ANITA (A New Introduction to Accounting), a curriculum renewal initiative aimed at making Canadian accounting education competitive with the best Accounting programs worldwide.
- » In 2000, Grant received the University of Waterloo's Distinguished Teacher Award presented to faculty members having a favourable, lasting effect on students; epitomizing intellectual vigour.
- » Grant established the Fellowship Program in 2003 to promote a mentoring relationship between distinguished alumni and talented students.
- » Grant championed the "professional student" concept as a vital way for students to see themselves and their future careers. This concept led to the development of the Professional Futures Conference (PFC), a two-day conference to prepare students for co-op and the professional workplace.
- » In 2003, through Grant's leadership, the Bachelor of Accounting and Financial Management (BAFM) degree program began.
- » Grant established the Russell Family Scholarship in 2007 to recognize students with outstanding leadership skills.

"Grant truly cares about his students, both past and present. He is an exceptional teacher, mentor and guiding light!"

— **Suzanne Patfield**, PDAcc '03



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Grant's legacy the impact of giving

"There's something very satisfying when a student says, 'You had an impact on my life,'" said Russell, when asked about why he chose to create the Russell Family Scholarship. Established in 2007, the Russell Family Scholarship has impacted the lives of more than ten students by helping to offset tuition costs. The endowment for the Russell Family Scholarship will continue to grow providing financial assistance to additional students in the future.

I am sincerely grateful for the financial assistance that the Russell Family Scholarship provided. It allowed me to concentrate more of my time on academics, volunteer work and extra-curricular activities. I founded the first finance organization at the University of Waterloo, now known as the University of Waterloo Finance Association, with time I was afforded as a result of the award that Professor Russell and his family donated.

— **Manav Kapoor**, MAcc 2013, Office of the Auditor General of Canada

The Russell Family Scholarship helped to support my first year at university. I am grateful to Professor Russell and his family for their generous donation to help SAF students achieve their educational goals.

— **Mina Huang**, MAcc 2012, BDO Canada

The Russell Family Scholarship relieved some of the financial burden that comes with attending university. Scholarships like this recognize the efforts put in by hardworking individuals. [They] motivate me to continue being a leader and a contributing [member of] the community.

— **Rowley Luo**, 2nd year student

Despite university being heralded as some of the "best years of your life," thinking back to my enrolment brings me a distinct memory of apprehension. Worries about the future, worries about uncertainty — the biggest were about my financial struggles. The Russell Family Scholarship let me focus on my studies and enjoy my first year. For that, I am forever grateful.

— **Jason Chen**, 4th year student

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join the tradition make an impact



We are always looking for donations to help fund new awards and scholarships like the Russell Family Scholarship.

Additional entrance scholarships will attract outstanding students. Upper-year and graduate awards and scholarships will retain top students by easing the financial burden of tuition. More than 100 SAF students now receive scholarships or awards, but many more deserve the same assistance. A greater array of awards and scholarships will mean students can put away their financial worries and focus on their studies. This will enable them to get the most out of their educational experience at Waterloo — and to retain a competitive advantage in the marketplace and in their careers.

The University of Waterloo's spirit of innovation cultivates knowledge and ideas that have an impact on local, national, and international communities. Scholarships and awards recognize student achievements, reward talented students for their accomplishments, and provide financial support to help with educational expenses.

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

scholarship recipients



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

UNDERGRADUATE SCHOLARSHIPS

Art Headlam Accounting Entrance Scholarship

Zi Wang

Barr Family Entrance Scholarship

Khush Chanda

Bill Harvie Scholarship/Fellowship

Hanning Cai
Chris Mathew
Janani Nirthanarajah

Catherine Campbell Scholarship

Yichen Cao

Catherine E.B. Hanna Accounting Entrance Scholarship

Steven Arsan
Megan Chan
Xuan Fu
Jun Hou
Yanglei Liu
Nicholas Macpherson
Alba Navarro
Sean Veitch
Ming Zeng

Chachra Family Entrance Scholarship

Basil Abo Alya

Charles Knight Entrance Scholarship

Justin Ye

Christopher and Claire Govan Scholarship

Kabilsaig Kittuppanantharajah
Songchen Zhao

Coulman-Tormasi Family Entrance Scholarship in Accounting and Finance

Panganan Li

David & Elizabeth Forster Scholarship

Claire Saddy

David T. Carter Entrance Scholarship

Megan Chan

Edward Maitland Dunn Memorial Scholarship

Yulin Li
Ying Xu

FCCP Education Foundation Entrance Scholarship in Accounting

Jeffery Bae

Friar Luca Pacioli Entrance Scholarship

Hanyang Wang

Gort Chong Family Award

Anonymous

Ives Family Entrance Scholarship

Thilakshya Theiventhirarajah

Karen Cheng Memorial Entrance Scholarship

No recipient

KPMG Entrance Scholarship

Syed Ahmed
Julia Fung
Qin Han
Kristen Lee
Moneeb Mahmood
Nilukshan Naguleswaran
Angela Wang-Lin
Jimmy Zhen

Kronos Accounting and Finance Award

Rahul Singh Verma

Linda Young Scholarship in Accounting and Finance

Lakshya Gera
Bilal Lodhi
Pooja Maniar

Lloyd Carr-Harris Foundation Scholarship

Hardeep Begda
Courtney Brown
Katherine Chan
Victoria Gibbings
Xue Yan

Mary Ann Finn Entrance Scholarship

Amber Cheung

Mary Rosenthal Entrance Scholarship

Charles Birkett

Merrill Lynch Scholarship of Excellence in Accountancy Studies

Andrew Antoun

Morley Lemon Scholarship

Kong-Chak Ho

Penelope Glasser Memorial Entrance Scholarship

Zoie Feng
Shu Liu
Jackie Sayadeth

“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



**Robert Harding
Entrance Scholarship**

Lisa Bian
Zhen Cao
Miao Wang

**Robert Harding —
President’s Scholarship**

Edward Bangala
Mantra Bhagat
Dhruvit Bhavsar
Michael Jans
Manasvita Sethi
Manveer Sidhu
Daniel Yang
Xuan Yang

**Robert J. Sproule
DECA Scholarship**

Syed Ahmed
Shubhankar Bhatt

**Robin K. Banks/Pacioli
Entrance Scholarship**

Samia Hassen
Guo Wang

**Ronald and Dorothy Webb
Entrance Scholarship**

Mohammad Najeeb

Rozee Scholarship

Jeannie Au

Russell Family Scholarship

Ishaan Sabharwal

**Scotiabank Accounting
Entrance Scholarship**

Anyi Wang

**SHAD Valley Alumni
Entrance Scholarship**

Jinsheng Zhou

**SHAD Waterloo Innovation
Challenge Scholarship**

Sherry Cheng

Shawn Porter Entrance Scholarship

Natalie Kieda

So Family Scholarship

Marvic Villanueva

**University of Waterloo — Waterloo
County Entrance Scholarship**

Jin Chu
Moksh Trivedi

**University of Waterloo Alumni @
Ernst & Young Scholarship**

Rishika Suri
Brent Xue

**University of Waterloo
Alumni Scholarship**

Annie Chan

**University of Waterloo Alumni @
BDO Dunwoody Scholarship**

Jia Huang

W.J. Schlatter Scholarship

Amil Khemani

Whelan Entrance Scholarship

Elisa Ching
Jingyi Xie

**William D. Packham Undergraduate
Entrance Scholarship**

Yao Li
Xinyu Shi

How you can support students

Award

» Multiple selection criteria, with attention to more than one area (e.g., academic excellence and financial need, academic excellence and community involvement).

Scholarship

» Selection criteria based primarily on academic excellence.

Bursary

» Selection criteria based primarily on financial need.

UPPER YEAR SCHOLARSHIPS

A.B McKie Memorial Scholarship

Jeanette Cyr
 Xin Shi

Anish Chopra Excellence in Finance Scholarship

Haoran Qiu

Cadesky Tax Award

Corey Chan

Friar Luca Pacioli Fellowship

Michelle Chan
 Evelyn Huang
 Annie Shi
 Joanna Yuan

Jha Family Scholarship for Excellence in Finance

Qi (Judy) Dong

Monique Goold Scholarship in Accounting and Finance

Jack Wang

Robert E. Gobeil Scholarship

Xiang (Lisa) Li

Robin K. Banks/Pacioli Fellowship

Jeffrey Hui
 Tina Jin
 Ryan Korn

School of Accounting and Finance China Co-op Award

Thelma Ng
 Juanrou Zhang

School of Accounting and Finance International Experience Award

Crystal Pang

School of Accounting and Finance Servant Leadership Scholarship

Adnan Khan

School of Accounting and Finance Volunteer Award

Junyao (Jo-Anne) Li

Upkar Arora School of Accounting and Finance Leadership Scholarship

Tiffany Chow

Waterloo-Wellington Chartered Accountants Association Scholarship

Eric Boehm
 Kevin Shin

Waterloo-Wellington Chartered Accountants Association Work-Term Report Award

Stanley Chen

GRADUATE SCHOLARSHIPS

» **MAcc:**

Bonnie Ho Memorial Award

Anson Lee

Borys and Rose Boritz Accounting Graduate Scholarship

Taariq Mahazudin
 Jing Wang

Cindy Ditner Award in Public Accounting

Carrie Law

Don Craig Memorial Award in Masters of Accounting

Onisifor Prisecaru
 Xin Yi Shi

The ISACA Toronto Research Paper Contest

Shirley Cheuk-Yi Wong
 Jacqui Anne De Jesus
 Jasdeep Garcha

John M. and Jim Harper Scholarship

Yueping Hu

» **MTax:**

Donald and Geraldine Beam Award

Ananth Balasingam
 Justin Wong

Frank and Azniv Lochan Family Foundation Award

Anonymous

MTax Entrance Scholarship

Arvind Kang
 Gilbert Ling
 Hong Wong

» **PhD:**

John Waterhouse PhD Scholarship

Kaleab Mamo

How you can support students

Named Trust

- » Supports a named award for a specific period. Requirement for undergraduate awards: minimum \$10,000. Requirement for graduate awards: minimum \$20,000.

Named Endowment

- » Gifts are invested in perpetuity to create a continuous revenue stream to support a chosen program. Requirements: minimum \$40,000 for undergraduate awards, \$50,000 for graduate awards.

Progressive Endowment

- » Multi-year gift of a trust for immediate support in combination with an endowment for sustainable funding.

Gifts to support scholarships at SAF can be pledged over a five year period.



SAF

Patricia O'Malley

an outstanding accounting professional

Patricia O'Malley, a celebrated leader in the development of international financial reporting standards and an outstanding member of the Canadian accounting profession received an honorary degree at the University of Waterloo's June 2016 convocation.

O'Malley was a pioneer who broke barriers for women and mentored those who followed her path in the accounting profession. Her academic success and strong interpersonal skills were instrumental in her hire by a predecessor firm to KPMG Canada at a time when few women were accepted for positions in the industry.

In the early 1990s, after only a few years as a partner in her firm, she became increasingly drawn to accounting research. She joined the Canadian Academic Accounting Association (CAAA) — which she was appointed president soon after joining.

While on semi-sabbatical from her firm, she explored teaching and study opportunities at Waterloo. The courses she taught included real-life cases that brought together theory and practice. During her time at Waterloo, she served as the sole practitioner on a team in the early years of the Centre for Accounting Ethics.

O'Malley later applied this expertise in accounting ethics while serving on the International Accounting Standards Board (IASB), during which important new standards were issued and significant progress was made in the global acceptance of International Financial Reporting Standards (IFRS).

In 2009, O'Malley resumed chair of the Canadian Accounting Standards Board as it navigated the transition to international standards. O'Malley also chaired the International Forum for Accounting Standard Setters for more than five years.

In recognition of her many contributions to the accounting profession, O'Malley received a Queen Elizabeth II Diamond Jubilee Medal in 2012 for her leadership in establishing rigorous national and international accounting standards, and for her contribution to the public's trust in Canadian capital markets.

AFM the fellowship program

Established in 2003, the Fellowship Program aims to cultivate outstanding leaders and future professionals by recruiting excellent students, and providing them with opportunities to grow and develop. All Fellowship students are matched with distinguished alumni (Honourees) who exemplify what can be accomplished in a professional career.

Supporters of the Fellowship program

In partnership with the support of generous donors, the School established the Student Fellowship Endowment Fund. This fund supports an award to every Fellowship student of \$9,000 over the course of their 4 years of study.

We are deeply grateful for the following donors 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)

To nominate an alumnus as an Honouree or to support the Fellowship Endowment Fund,

please contact **Alex Lippert**, Sr. Alumni and Development Officer at allipper@uwaterloo.ca; or 519-888-4567, ext. 38227.



AFM 2016 fellows

Shubhankar Bhatt » The Brian Wu Fellow

Brian Wu, MAcc 2009, CPA, CA, CFA
CIBC Capital Markets

Megan Chan » The Karen Trudeau Fellow

Karen Trudeau, BMath 1992, CPA, CA
BDO

Stella Graf » The Scott Shannon Fellow

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

Samia Hassen » The Laura Da Re Fellow

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

Mitchell Kong-Chak Ho » The Eric Borromeo Fellow

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

Amil Khemani » The Adam Laiken Fellow

Adam Laiken, MAcc 2004, CPA, CA, CBV
BDC

Dina Pangnan Li » The John Gort Fellow

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

Joyce Lu » The John Wonfor Fellow

John Wonfor, BMath 1985, FCPA, FCA
BDO Canada

Susan Lu » The Hannah Chow Fellow

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

Richard Moser » The Manjit Singh Fellow

Manjit Singh, BA 1993, CPA, CA
TD Bank Group — Canadian Retail banking

Vidya Nair » The Tim Brose Fellow

Tim Brose, BMath 1981, CPA, CA
MNP

Alba Navarro » The Bo Wang Fellow

Bo Wang, 2009, CPA, CA
Cineplex Entertainment

Braedon Savage » The Nicole D'Souza Russell Fellow

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

Sean Veitch » The Anish Chopra Fellow

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

Claudia Voin » The Margaret Shackell-Dowell Fellow

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

Karen Ying Xu » The Patricia O'Malley Fellow

Patricia O'Malley, Honourary Doctorate 2016, FCPA, FCA

Angela Xue Yan » The Swati Patel Fellow

Swati Patel, BA 1993, CPA, CA
PwC

Pamela Wanyue Zeng » The Alexandra Hardy Fellow

Alexandra Hardy, MAcc 1999, CPA, CA
BDO Canada

AFM 2015 fellows

Damir Baizhiyenov » 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.

***Ria Bharadwaj » The Karen Atkinson Fellow**

Karen Atkinson, BMath 1992, CPA, CA
EY

Cindy Chen » The Doug Johnson Fellow

Doug Johnson, MAcc 1985, CACM
Equity Financial Trust

***Jenny Jiaying Chen » The Dean Einarson Fellow**

*Dean Einarson, MAcc 1991, CPA, CA
DesignDocs Inc.

***Judy Zhihui Cheng » The Russ Weir Fellow**

Russ Weir, BMath 1985, CPA, CA
BDO Canada

***Jennifer Yumeng Du » The Geoff Hayes Fellow**

Geoff Hayes, MAcc 2004, CPA, CA
KPMG

***Laura Fong » The Joseph Wilke Fellow**

Joseph Wilke, BA 1992, CPA, CA
Mattamy Homes

***Jonathan Hui » The Cristina Shortt Fellow**

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

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

***Kenneth Loong » The Chester Dawes Fellow**

Chester Dawes, BMath 1999, PDAcc, CPA, CA, CPA
(US), CFA

***Rowley Luo » The Mike Garvey Fellow**

Mike Garvey, BA 1969, FCPA, FCA, ICD.D

***Abeera Mohyuddin » The Catherine Wong Fellow**

Catherine Wong, MAcc 2006, CPA, CA,
OMERS

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

***Jaskirat Sahi » The Mark Eamer Fellow**

Mark Eamer, MAcc 1995, CPA, CA
Stacey Muirhead Capital Management Ltd.

***Aastha Saini » The Diana Dunlop Fellow**

Diana Dunlop, MAcc 2002, CPA, CA
Deloitte

***Kevin Shin » The Bryan Lee Fellow**

Bryan Lee, BMath 2008
Scotiabank Global Banking and Markets

Fineas Tatar » The Frank Lochan Fellow

Frank Lochan, MTax 2002, MSc (Econ), CPA, CA, CBV,
FCA (UK), FCCA (UK)
Karma Industries Limited

***Joseph Vaccaro » The Jim Kopperson Fellow**

Jim Kopperson, MAcc 1991, CPA, CA, CPA (US)

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, CPA, CA
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 Penna

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

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

Michelle Li » The Jerry Whelan Fellow

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

Michelle Xin Li » The Terie Chan Fellow

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

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

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MDD Forensic Accountants

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AFM

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SAF

alumni association history

University of Waterloo School of Accounting and Finance Alumni Association

The Alumni Association mandate established in 1983 remains the same today — to strive to keep alumni connected, informed and engaged, while building awareness within the corporate community and aiding with the successful educational experience of students.

The Alumni Association thanks members, Gavin Swartzman (MAcc 1988) and Vlad Moisseikin (MAcc 2008) for their years' of service, and welcomes new members, Victoria Davies (MAcc 1988), Dinesh Balakrishnan (MAcc 2014), and Arthur Wang (MAcc 2013).

Learn how you can partner, invest, or hire:

- » Make a gift to support SAF students, faculty and programs
- » Nominate fellow alumni to become an Honouree or for an Alumni Achievement Award
- » Host a class reunion for your 5th, 10th, 15th, or 20th anniversary
- » Hire a co-op student or a recent grad
- » Become a mentor or guest speaker
- » Attend University and School alumni events
- » Join our Alumni Association Committee

2016 EXECUTIVE MEMBERS

- Elaine Lee**, BA '03, President
Jesse Waltman, MAcc '05, Past President
Victoria Davies, MAcc '88, VP, Connections & Events
Dinesh Balakrishnan, MAcc '14, VP, Young Alumni
Arthur Wang, MAcc '13, VP, Communications

“Alumni are looking for means to stay connected with fellow alumni, the School and the University, and they’re seeking ways to give back. We want to meet their needs by keeping them engaged and by showing how they can make a contribution.”

— **Elaine Lee**, BA 2003, President, UW SAF Alumni Association

To partner, invest, or hire, contact **Sheilaah Guthrie**, Associate Director of Advancement at sheilaah.guthrie@uwaterloo.ca; or 519-888-4567, ext. 38917.





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