

School of Accounting and Finance

Awards CELEBRATION 2017

PAST, PRESENT, FUTURE

Thursday, November 30, 2017

6:00 p.m. Reception
6:45 p.m. Formal Program

University of Waterloo
Federation Hall



UNIVERSITY OF
WATERLOO

SAF TIMELINE

1981-1985

- › The Accounting Group is created
- › Accounting Students Association (ASA) is formed
- › UW Accounting Alumni Association is formed

1991-1995

- › Centre for Accounting Ethics is established

2001-2006

- › Accounting and Financial Management (AFM) launched as a five-year integrated undergraduate program leading to the Master of Accounting (MAcc)
- › SAF Fellowship program is formed
- › SAF is first to introduce e-portfolios to undergraduate programs
- › SAF is first to launch an Accounting and Finance Living-Learning Community

2006-2011

- › Computing and Financial Management (CFM) undergraduate program is launched
- › School of Accountancy renamed to School of Accounting and Finance (SAF)
- › Grand opening of new SAF wing of the Hagey Hall of Humanities building
- › A three-day Professional Futures Conference (PFC) is offered to Year 2 SAF students
- › SAF Alumni Awards are established
- › Debut of Accounting and Financial Management Admissions Assignment (AFMAA)
- › SAF is first to introduce an upper-year Living Learning Community (LLC)
- › Master of Quantitative Finance (MQF) graduate program is launched
- › Learning Model launched for Fall 2011 AFM class
- › Accounting and Finance Student Association (AFSA) replaces Accounting Students Education Contribution (ASEC) and Accounting Student Association (ASA)
- › First UWaterloo Accounting Conference (UWAC) offered

1985-1990

- › Master of Accounting (MAcc) graduate program is launched
- › Accounting Group officially becomes the School of Accountancy
- › First cohort of PhD students begin studies

1996-2000

- › Master of Taxation (MTax) graduate program is launched
- › The Deloitte Centre for Tax Education and Research is established
- › Biotechnology/Chartered Accountancy (Biotech/CA) undergraduate program is launched
- › First WATCase Competition
- › University of Waterloo Centre for Information Integrity and Information Systems Assurance (UWCISA) is established

2012-2016

- › Launch Your Career (LYC), a Year 1 professional development conference is introduced
- › Opening of the new Finance and Analytics Lab
- › Student Investment Fund (SIF) is established
- › Financial Literacy Competition (FLC) is offered to teachers to enhance high school financial literacy curriculum
- › Waterloo Centre for Taxation in a Global Economy is established
- › Student team takes world championship at the global CFA Institute Research Challenge
- › Four National Gold Medal winners in the last six years for the Chartered Accountancy Uniform Final Exam (UFE)

2017 – NEW INITIATIVES

- › Problem Based Learning (PBL) is introduced into curriculum
- › Student Venture Fund (SVF) is initiated
- › CPA Ontario Centre for Performance Management Research and Education (CPMRE) is established
- › Thompson Reuters support of EIKON software for the SAF's Finance and Analytics Lab

SAF DIRECTOR'S MESSAGE

Awards
CELEBRATION 2017



“The School of Accounting and Finance has a rich history of educational innovation. Our unique programs along with co-operative education and experiential learning reflect our commitment to preparing our students for the world they will be entering upon graduation, the world of their future.”

JIM BARNETT, Interim Director,
School of Accounting and Finance

Welcome and thank you for attending the 14th annual SAF Awards Celebration. We are so proud to host this year's celebration here at the University of Waterloo, on our 60th anniversary year. Tonight, we come together to honour our past, celebrate our present and embrace our future.

As we stand on the heights of our success and celebrate 60 years as a University and 150 years as a country, we are excited about our role of developing the accounting and finance talent of tomorrow, and watching as our students and alumni thrive both in and out of the classroom as versatile, adaptive, confident and informed leaders.

We have set our sights on transforming the accounting and finance professions, future-proofing our students to ensure they are well equipped to thrive in the rapidly-changing world they are entering.

To our donors and supporters, faculty and staff, honourees and fellowship students, scholarship recipients, student and alumni associations and alumni award winners, we are immensely grateful for your continued involvement and on-going support and we are thrilled to commemorate all we have achieved together and all we will continue to achieve in the years ahead.

Tonight we celebrate together, as together we are shaping the future. Together, we will build from a position of strength, capitalizing on the opportunities presented by this new era and building the leaders of tomorrow.

Jim Barnett

SAF MASTERS OF CEREMONIES

Beth Vachon

Beth is currently in her final term in the AFM program. Through the Fellowship Program, Beth has had the opportunity to get involved in various areas of SAF, including working as a Research Assistant for Christine Weidman on gender parity, tutoring in the SAF Academic Coaching Centre and marking tax exams. In addition to her activities with the Fellowship Program, Beth has participated in the Young Tax Professionals group and the David T. Carter Foundation team. Beth was also named the 2017 recipient of the Jane M. Klausman Women in Business Award from the Kitchener-Waterloo branch of Zonta International. She plans on continuing her education in the MAcc program in January and working toward her CPA designation.



Thinisha Gunasekera

Thinisha is an international student from Sri Lanka currently in his 4B term of AFM, focusing his studies toward finance. He participated in the Student Investment Fund for four terms, advancing to the role of Chief Investment Officer for this fall. Thinisha and the SAF team demonstrated their skills, placing second in the 2017 CFA Institute Research Challenge, extending SAF's four year tradition of reaching the Americas Regional level for this competition. He has gone on to place in other competitions focused on stock pitches and mergers and acquisitions. Thinisha and his teammates placed second at the Harvard University Stock Pitch competition this fall. These diverse learning opportunities have prepared Thinisha for work term roles as an Equity Research Associate at a leading Asset Management firm.



SAF 2017 ALUMNI ACHIEVEMENT AWARD WINNERS

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

Cindy Ditner

MAcc '86, CPA | Global Head of Assurance, BDO International

Cindy is responsible for developing auditing and assurance standards, training and software tools for the BDO network worldwide. Previously she was the chair of BDO International's Audit Steering Committee, the group that is responsible for setting policies and standards to ensure quality in their global audit practice. Prior to joining the international firm, Cindy was the National Assurance Standards Partner for BDO Canada for many years, holding several other positions in the Canadian firm before that. Cindy served as a member of CPA Canada's Audit and Assurance Standards Board for seven years during the period when Canada decided to adopt International Standards on Auditing. She also served on CPA Canada's Board of Evaluators for the last three Uniform Final Examinations. Cindy has remained involved in UWaterloo through the Accounting and Finance Alumni Association.



Carol Leaman

MAcc '89, FCA | President & CEO, Axonify Inc.

Carol is the President and CEO of Axonify Inc. Prior to Axonify, Carol was the CEO of PostRank Inc., a social engagement analytics company that she sold to Google in June 2011. Previously, Carol held C-level positions at RSS Solutions and Fakespace Systems, to which she also sold to strategic acquirers. A regular contributor to Fortune magazine and a well-respected thought leader, Carol has been published in learning, business and technology journals. She brings her experience and insight to not-for-profit and for-profit boards and has won awards, including the Waterloo Region Entrepreneur Hall of Fame Intrepid Award (2011), the Sarah Kirke Award (2010) for Canada's leading female entrepreneur and the Canadian Business Profit 500 Female Entrepreneur of the Year (2017).



To nominate SAF alumni or for additional information, please contact Sheilaah Guthrie, Associate Director of Advancement at sheilaah.guthrie@uwaterloo.ca; or 519-888-4567, ext. 38917.

SAF 2017 YOUNG ALUMNI AWARD WINNERS

The School of Accounting and Finance Young Alumni Award recognizes alumni who have 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.

Jane Chung

MAcc '07 | Founder & CEO, Perked!

Jane Chung is the CEO of Perked!, a software company recently recognized as an ICT Emerging Rocket company in British Columbia in 2017. Jane was a Manager at KPMG in the Financial Services practice in Toronto prior to being appointed as a Senior Manager at the Canadian Public Accountability Board, supporting the expansion of their Western Canada team before moving over to Perked! Working in the technology industry, Jane is passionate about elevating the diversity and inclusion of Women in Tech. She mentors, facilitates workshops, and supports fellow women in tech through Founders Network, a global network of peer entrepreneurs. Working in the technology industry, Jane is passionate about enhancing the diversity and inclusion of Women in Tech. She mentors, facilitates workshops, and supports fellow women in tech through Founders Network, a global network of peer entrepreneurs.



Megan Tong

MAcc '09 | Co-founder, Kanga and Manager of Business Development, Top Hat

Megan Tong is currently the Senior Manager of Business Development at Top Hat. She co-founded Kanga, Toronto's first Australian-style meat pie shop. The idea for Kanga was conceived during a KPMG work secondment to Australia, and what started as an idea for a pop-up quickly grew into a successful chain of restaurants. Prior to founding Kanga, she worked at the MasterCard Foundation, managing partnerships with NGOs at the front lines of Education and Financial Inclusion in Sub-Saharan Africa. Megan has been an avid champion of entrepreneurship through her involvement with Junior Achievement and Futurpreneur.



Vikram Somasundaram

MAcc '11 | Chief of Staff, Chartered Professional Accountants of Ontario

Vikram directs thought leadership and works closely with CPA Ontario's Executive Team on strategic planning and special projects. Previously, he was the CEO and Co-Founder of Edusight, an education technology startup serving over 300K students worldwide and acquired by Nelson earlier this year. He also recently launched a micro-VC fund focused on making seed stage investments in emerging technologies, including artificial intelligence and virtual reality. Vikram is passionate about good design, emerging technology and its impact on society, and the Toronto Raptors.



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Master of Taxation Turns 20

Twenty years ago Jim Barnett, then Director of the Master of Taxation (MTax) program and currently Director of the School of Accounting and Finance, launched the MTax program with a team of academics and tax professionals.

Deb Kraft, the current Director of the MTax program, often brags of the fact that the program has grown from a class of 12 in 1997 to 40 new students entering the program this Fall and nearly 450 alumni. This year also celebrates teaching milestones of Greg Boehmer (EY), Hugh Chasmar (Deloitte), and Stan Laiken (UW), who have been with the MTax program since the program was launched.

“With a focus that delivers strong foundational skills including tax research, writing and presentations, the MTax program has evolved. It reaches beyond technical competencies, preparing graduates for roles as high performing members of the tax community,” states Joanna Agnello (MTax 2014).

Stan Laiken, Professor Emeritus granted Honorary CPA

Professor Emeritus, Stanley Laiken was granted Honorary Membership at the Annual Meeting of CPA Ontario. Honorary membership is sparingly bestowed with Stan being only the second recipient. As a tax educator par excellence, Stan’s membership comes at a fitting time as September 2017 also marked the 100th anniversary of the introduction of federal income tax legislation in Canada.

His classroom antics were what made tax fun and interesting for his students, from t-shirts with slogans such as “Tax is a microcosm of life” to his famous Aerobics Tax Roll Over dance, Stan has inspired hundreds of students across Canada to pursue careers in accounting and tax.



Did You Know?

The Canadian Income Tax Act Turns 100

The Income War Tax Act was introduced as a temporary remedy to support Canada’s involvement in World War One. Now, 100 years later, approximately 62 per cent of the federal government’s total budgetary revenue is generated by personal and corporate income taxes.

SAF EXPERIENTIAL LEARNING

Student Investment Fund turns 5

The Student Investment Fund (SIF) provides an outstanding learning experience that exemplifies the School's commitment to experiential learning. Students learn by managing real money in real time under the guidance of faculty and industry mentors. To date 150 students have participated in the program, taking the knowledge gained to successfully compete in investment competitions and earning coveted co-op and full-time placements in the financial sector.

Student Venture Fund – Just Launched

SAF launched the University of Waterloo Student Venture Fund (SVF) in September 2017. A collaboration between SAF and the Conrad Business Entrepreneurship, and Technology Centre (CBET), the SVF provides hands-on training in venture capital investing and will be open to students from both schools. A learning opportunity to invest in early stage companies with angel investors from the KW region and Toronto, the student team will be guided by experienced investors and faculty mentors.

Problem-based Learning (PBL) – A New Initiative

The SAF is introducing PBL to build confidence and competencies in our students as they face a world of uncertainty. PBL uses a small classroom or “pod” format where groups of 8 to 10 students with a tutor meet to work through an open-ended and unfamiliar finance and accounting problem. These students are required to generate their solution independent of the tutor. This format encourages students to enhance their problem-solving skills, but with guidance where needed. PBL is the logical extension of both the SAF's and the University's educational philosophy, and introduces a new pedagogy to enrich and expand our students' skill sets.

“SIF has provided me with excellent foundational skills in equity analysis and exposure to the finance sector. Faculty members and students alike contributed to a unique learning and mentoring environment, where I felt I was pushed to challenge myself and grow.”

HELLEN XIA,
3B, Science Biotech/CPA, SIF



SAF Business Analytics Teams – 2 years of wins

In May 2017, a team of SAF students headed to New York City with faculty advisor Kieng Iv where they successfully defended the first place title that another SAF team had won a year earlier in the Business Analytics Competition & Conference at Manhattan College. Between those two wins, a third team of SAF students won the “Most Value to Hire Heroes” award at the Terradata University Network’s Data Challenge. The competitive successes illustrate the benefits to students from the experiential approach taken to deliver SAF business analytics courses in the Finance and Data Analytics Lab.

International Study Trip – Just Launched

The SAF’s first International Study Trip took place in August 2017 with 12 students visiting London, UK after months of organization and planning. The focus of the trip was “The Implications of Brexit on Global Financial Markets.” Students participated in 10 meetings in London with a wide variety of people in accounting, finance, industry and government. Each student then wrote a paper, documenting what they learned from the meetings and their pre-trip research. The students’ pre-trip research, meeting participation, and report combined into a “for-credit” experiential course.

SAF Crews – Just Launched

In September 2017, the SAF launched the “SAF Crews” initiative to engage first year students in experiences across four experience areas: Academic, Career, Health, and Community. Crews are groups of 10 students that support each other through their first year experience. Crew members build strong working relationships with each other, attend events together, and support each other’s professional awareness and academic success. Each Crew’s Communicator meets regularly with a SAF staff member who provides coaching and fosters two-way communication between the students and faculty/staff.



SAF RESEARCH AT WATERLOO

UWCISA – 20 Years of Symposia on Information Integrity and Information Systems Assurance

In October 2017, the University of Waterloo Centre for Information Integrity and Information Systems Assurance (UWCISA) held its 10th biennial symposium. The Centre's symposia are recognized for the extensive interaction between practitioners and academics. Papers and expert panels presented by academics and practitioners address risks, controls, assurance and emerging issues. The symposia encompasses the three directives of the UWCISA's mission: research, education and knowledge transfer, and interaction among practitioners, educators and students.

Ken Klassen Receives CAAA L.S. Rosen Outstanding Educator Award – 9th Recipient

In June 2017, Ken Klassen was presented with this distinguished award at the Canadian Academic Accounting Association (CAAA) conference, becoming the 9th SAF faculty member to receive this award since its establishment in 1983. The award recognizes excellence in guidance for graduate students, teaching, publications, educational innovation and involvement in professional and academic societies and activities. In his 21 years teaching at Waterloo, Klassen has supervised six graduate students, three of whom have received international dissertation awards. He has also developed several tax courses for master's programs on campus, including the Master of Taxation program.

CPA Ontario Centre for Performance Management Research and Education – Just Launched

Established in 2017, the Centre for Performance Management Research and Education's (CPMRE) objectives are to advance the profession through performance management research and education and to provide thought leadership on topics of importance to practitioners. The topics will focus on strategy implementation, performance measurement, compensation and incentives, management control systems, and business analytics. The Centre will develop new programs that bring together industry and faculty, build strong strategic cross-disciplinary alliances, conduct conferences and symposia, and embody a strong education culture that emphasizes experiential learning.

SAF 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

- › Pei fen Fong
- › XueHan Wang

Barr Family Entrance Scholarship

- › Anyang Yuan

Benjie and Sonia Thomas Scholarship in Accounting and Finance

- › Stephanie Chui

Bill Harvie Scholarship/Fellowship

- › Emma Liang
- › Xiao Han Yang

Catherine Campbell Scholarship

- › Jing Ran Huang

Catherine E.B. Hanna Accounting Entrance Scholarship

- › Bianca Bowen
- › Yuanyuan Chen
- › Kimberly Dela Cruz
- › Jordan Fletcher
- › Mansi Patel
- › Laura Robertson

- › Wanshu Wang
- › Yigga Zhang

Chachra Family Entrance Scholarship

- › Yu Jing Tao

Charles Knight Entrance Scholarship

- › Xinzhu Chen

Christopher and Claire Govan Scholarship

- › Margaret Chen
- › Kevin Li

David & Elizabeth Forster Scholarship

- › Reenujaa Uthayanan

David T. Carter Entrance Scholarship

- › Robert Aranha
- › Xin Ge Zhou

Edward Maitland Dunn Memorial Scholarship

- › Vivian Wu

FCCP Education Foundation Entrance Scholarship in Accounting

- › Kelly Zhang

Friar Luca Pacioli Entrance Scholarship

- › Dylan Brown

Ives Family Entrance Scholarship

- › Ying Tung Cheng
- › Marcelina Pitula

KPMG Entrance Scholarship

- › Prajwol Bhandary
- › Stephanie Gu
- › Maggie He
- › Siqing Huo
- › Xinyi Li
- › Ling Cheng Meng
- › Anjali Ukrani
- › Xin Ning Yuan

Linamar Scholarship in Accounting and Finance

- › Shirley Tang

Linda Young Scholarship in Accounting and Finance

- › Jessica Kuo
- › Yin Tao Candice Lee
- › Jing Fei Peng

Lloyd Carr-Harris Foundation Scholarship

- › Lauren Argue

Louise Trapp Entrance Scholarship in Mathematics

- › Jing Xian Zhang

SAF SCHOLARSHIP RECIPIENTS

CONTINUED

Mary Ann Finn Entrance Scholarship

- › Talha Surangiwala

Mary N. Bales Entrance Scholarship

- › Jiawen Zhang

Mary Rosenthal Entrance Scholarship

- › Yuanyuan Chen

Merrill Lynch Scholarship of Excellence in Accountancy Studies

- › Ellen Tong

Morley Lemon Scholarship

- › Jash Patel
- › Isaac See-Chai Wong

Penelope Glasser Memorial Entrance Scholarship

- › Shail Patel
- › Jhalina Visvalingam

Robert Harding Entrance Scholarship

- › Jiayi Gao
- › Saadia Gul
- › Jack Thompson
- › Xinqing Yang

Robert J. Sproule DECA Scholarship

- › Tommy Du
- › Yu Cheng Huang
- › Edward Liu

Robin K. Banks/Pacioli Entrance Scholarship

- › Parbir Deol

Ronald and Dorothy Webb Entrance Scholarship

- › Julia Grant

Rozee Scholarship

- › Jeremy Mai

Russell Family Scholarship

- › Khadeeja Arif

Shawn Porter Entrance Scholarship

- › Qian Ru Yang

So Family Scholarship

- › Kabilan Asokan

University of Waterloo — Waterloo County Entrance Scholarship

- › Stephanie Otto

University of Waterloo Alumni @ Ernst & Young Scholarship

- › Richard Hawkes Cai

University of Waterloo Alumni @BDO Dunwoody Scholarship

- › Rico Li

W.J. Schlatter Scholarship

- › Michelle Wong

Whelan Entrance Scholarship

- › Thulasi Arulanantham
- › Shirley Wu

Upper Year Scholarships

Anish Chopra Scholarship for Excellence in Finance

- › Jeffrey Liu

Bill Harvie Scholarship/Fellowship

- › Chris Mathew
- › Hanning Cai
- › Janani Nirthanarajah

Cadesky Tax Award

- › Mark Fehrman

C.U.P.E. Local 793 Award

- › Joshua Wu

Friar Luca Pacioli Fellowship

- › Christina Liu
- › Joanna Yuan
- › Brendan Mick

Jha Family Scholarship for Excellence in Finance

- › Judy Dong

Lloyd Carr-Harris Foundation Scholarship

- › Xue Yan
- › Hardeep Begda
- › Courtney Brown
- › Katherine Chan

MAcc Class of 1986 Scholarship

- › Agsaran Aron San

Monique Goold Scholarship in Accounting and Finance

- › Basil Abo Alya

Residence Life Student Leadership Award

- › Yousuf Jinnah

Robert E. Gobeil Scholarship

- › Tianjia Huang

Robin K. Banks/Pacioli Fellowship

- › Samuel Siu
- › Tina Jin
- › Joey Deng
- › Qianyu Zhang

School of Accounting and Finance Servant Leadership Scholarship

- › Alexandra Sharr

School of Accounting and Finance Volunteer Award

- › Jasper Lam

University of Waterloo Alumni Scholarship

- › Annie Chan

Upkar Arora SAF Leadership Scholarship

- › Jacqueline Sue

Waterloo-Wellington Chartered Accountants Association Scholarship

- › Charmian Wenger
- › Matthew Papadopoulos

Waterloo-Wellington Chartered Accountants Association Work-Term Report Award

- › Jamie McMahan

Graduate Scholarships

MAcc

Bonnie Ho Memorial Award

- › Robert Tarbush

Borys and Rose Boritz Accounting Graduate Scholarship

- › Adnan Khan
- › Jeffrey Hui

Cindy Ditner Award in Public Accounting

- › Stephen Chen

John M. and Jim Harper Scholarship

- › Aidan McKay

Accounting Alumni Gold Medal Award for Excellence in Accounting

- › Sophia Chen

MTax

Donald and Geraldine Beam Award

- › Cristian Mogosh

Frank and Azniv Lochan Family Foundation Award

- › Anonymous

Canadian Tax Foundation Scholar Award

- › Gilbert Ling

Canadian Tax Foundation National Conference Award

- › Christina Velez-Chua
- › Justin Yeung
- › Joanne Zhu

PhD

John Waterhouse PhD Scholarship

Christopher Wong

“Creating a named student award at SAF delivers a measurable and immediate impact by attracting, enabling and rewarding deserving students, easing their financial stress, inspiring and motivating students to believe in themselves, putting them on the path to success through experiential learning (co-operative education, exchange programs, etc.) and by providing them with access to a world-class education that fosters innovation and ideas. You can support our students by establishing an award or scholarship or funding a named endowment.”

SHEILAAH GUTHRIE,
Director, SAF Advancement

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



AFM FELLOWSHIP PROGRAM

Reaching the milestone of 15 years, 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 up to \$9,000 over the course of their four years of study.

We are deeply grateful for the following donors who have supported the fund.

To nominate an alumnus as an Honouree or to support the Fellowship Endowment Fund, please contact Sheilaah Guthrie, Associate Director of Advancement at sheilaah.guthrie@uwaterloo.ca; or 519-888-4567, ext. 38917.

AFM 2017 FELLOWS

Lauren Argue,
The Adam Laiken Fellow
Adam Laiken, MAcc 2004, CPA, CA
Business Development Bank of Canada

Khadeeja Arif,
The Nicole D'Souza Russell Fellow
Nicole D'Souza Russell,
MAcc 1999, CPA, CA, CPA (US)
Bell Mobility

Michael Daniel,
The John Gallinger Fellow
John Gallinger, MAcc 1997, CPA, CA
The Gallinger Group

Kimberly Dela Cruz,
The Ben Kaak Fellow
Ben Kaak, BA 1992, CPA, CA
KIK Custom Products Inc.

Parbir Deol,
The Tim Rollins Fellow
Tim Rollins, MAcc 1996, CPA, CA
Ernst & Young, LLP

Jordan Fletcher,
The Philip Mayers Fellow
Philip Mayers, MAcc 1986, CPA, CA, CMA
Genworth Canada

Amaris He,
The Kieng Iv Fellow
Kieng Iv, BAFM 2011, CPA
Real Matters

Edward Liu,
The Ken Newport Fellow
Ken Newport, MAcc 1988, CPA, CA
BioCan Rx

Julianna McEdwards,
The Meng Wang Fellow
Meng Wang, BAFM 2011
Uber

Mansi Patel,
The Charles Lee Fellow
Charles Lee, MAcc 2001, CPA, CA
Scotiabank

Laura Robertson,
The Vikram Somasundaram Fellow
Vikram Somasundaram, MAcc 2011
Chartered Professional Accountants
of Ontario

Shirley Tang,
The David Lin Fellow
David Lin, MAcc 2009, CPA, CA
KPMG

Isaac Wong,
The Don Brazier Fellow
Don Brazier, MAcc 1987, CPA, CA
Ontario Power Generation

Vivian Wu,
The Sue Reibel Fellow
Sue Reibel, BMath 1988, CPA, CA
Manulife Financial Corporation

Shirley Wu
The Brenda Brazier Fellow
Brenda Brazier, MAcc 1987, CPA, CA
Deloitte

Olivia Yang,
The Jane Ritchie Fellow
Jane Ritchie, MAcc 1987, CPA, CA, CMA
Ritchie Shortt & Tully LLP,
Chartered Accountants

Roseline Yang,
The Sarah Netley Fellow
Sarah Netley, MTax 2012, CPA, CA
Collins Barrow

Yigga Zhang,
The Pamela Steer Fellow
Pamela Steer, MAcc 1994, CFA, CPA, CA
Workplace Safety & Insurance Board

AFM 2016 FELLOWS

Basil Abo Alya*

The Nancy Lala Fellow

Nancy Lala, MAcc 1986, CPA, CA, CMA
About Communications

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

Amber Cheung*

The Shikha Gandhi Fellow

Shikha Gandhi, MAcc 2004, CPA, CA
Purolator

Daniel Clarke*

The Tracy Elop Fellow

Tracy Elop, MAcc 1989, FCPA, FCA
Carizon Family and Community Services

Rena Ding*

The Dave Middleton Fellow

Dave Middleton, BMath 1984, CFA, CPA, CA
Fairwater Capital Corporation

Ahmed Hosni Takey Eldin*

The Mike Williams Fellow

Mike Williams, MTax 2002, MBA, PEng, CFA
Independent Accountants' Investments Counsel

Sophie Fu*

The Jayme Yeung Fellow

Jayme Yeung, MTax 2003, CPA, CA
PwC

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
Volkswagen Group Canada

Mitchell Ho,

The Eric Borromeo Fellow

Eric Borromeo, MAcc 1990, CPA, CA
Wells Fargo Bank

Dina Pangnan Li,

The John Gort Fellow

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

Jason Li*

The Federica Nazzani Fellow

Federica Nazzani, MAcc 1995, FCPA, FCA
Capital Assist (Valuation) Inc.

Rahul Lohana*

The Hannah Chow Fellow

Hannah Chow, MTax 2002
Sadhra & Chow, LLP

Joyce Lu

The John Wonfor Fellow

John Wonfor, BMath 1985, FCPA, FCA
BDO Canada

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, BAFM 2009, CPA, CA
Potentia Renewables Inc.

Pasan Pajapakse*

The Betty Ann Jarrett Fellow

Betty Ann Jarrett, MAcc 1996, CPA, CA
PwC

Brianna Prive*

The Tracy Mann Fellow

Tracy Mann, MAcc 1994, CPA, CA
Economical Insurance Group

Michelle Rhee*

The Sabrina Nazzani Fellow

Sabrina Nazzani, MAcc 1995, CPA, CA
Capital Assist (Valuation) Inc.

Ishaan Sabharwal*

The Jennifer Fiddian Green Fellow

Jennifer Fiddian Green, BA 1994, CPA,
CA.IFA, CAMS, CFI, CFE

Grant Thornton

Jessica Siew*

The Geoff Hayes Fellow

Geoff Hayes, MAcc 2004, CPA, CA
KPMG Canada

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 Xu,

The Patricia O'Malley Fellow

Patricia O'Malley, Honourary Doctorate 2016,
FCPA, FCA
Retired — Canadian Accounting
Standards Board

Angela Yan,

The Swati Patel Fellow

Swati Patel, BA 1993, CPA, CA, CPA Illinois
PwC

Chelsea Ye*

The Suzanne Patfield Fellow

Suzanne Patfield, PDAcc 2003, CPA, CA
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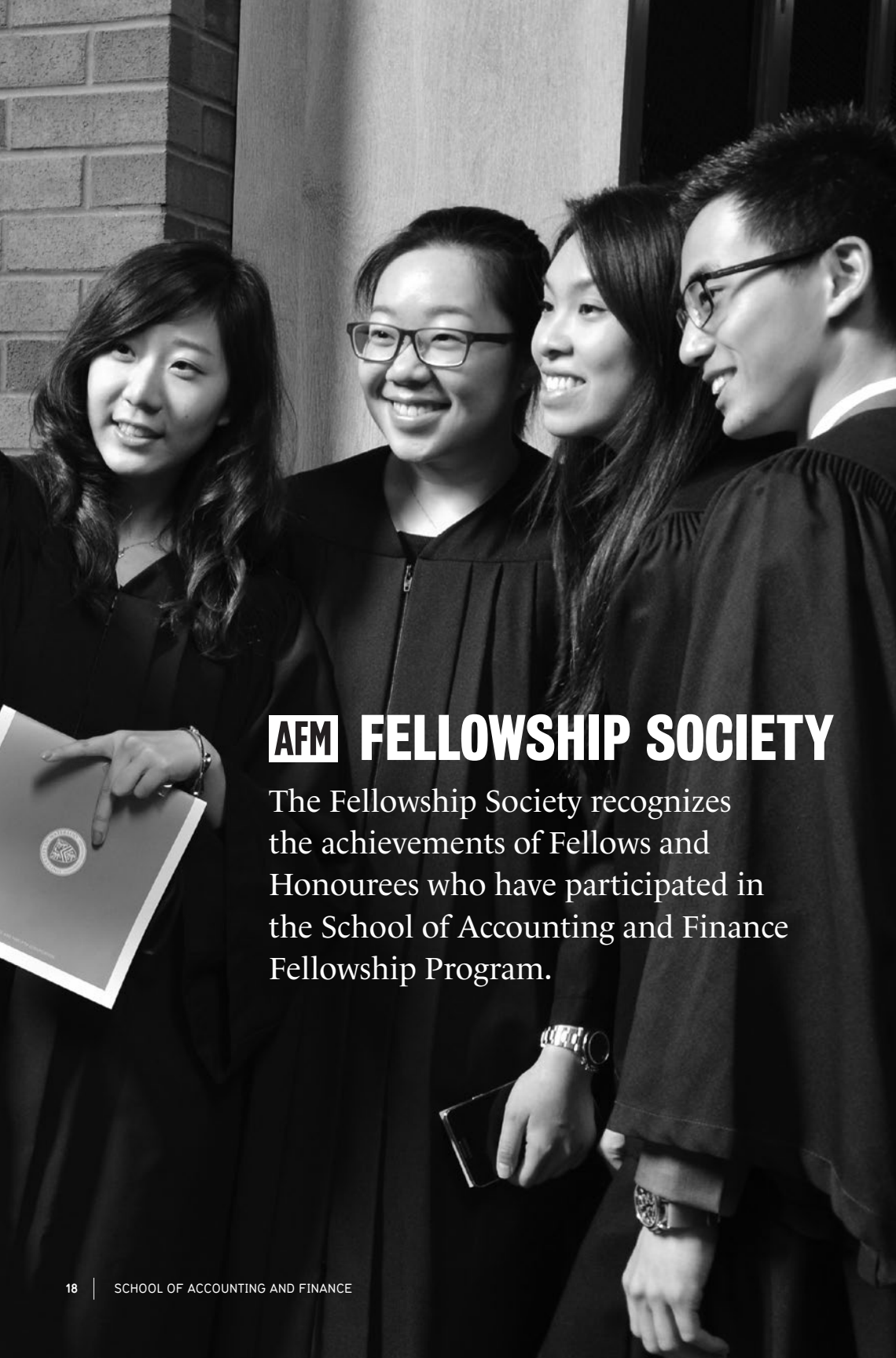
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- › Hire a co-op student or a recent grad
- › Become a mentor or guest speaker
- › Attend University and School alumni events
- › Join our Alumni Association Committee

“Alumni are continually looking for new and meaningful ways to stay connected with fellow alumni, the School and the University. We want to meet their needs by keeping them informed and engaged while building awareness with the corporate community and siding with the successful educational experience of students.”

ELAINE LEE, BA '03,
President, UWaterloo SAF Alumni
Association
Alumni Association

2017 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

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

Thank you for attending the 2017 SAF Awards Celebration






We hope you enjoyed learning more about the School of Accounting and Finance community this evening.

PAST, PRESENT, FUTURE

PAST, PRESENT, FUTURE



Awards CELEBRATION 2017

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