

School of Accounting and Finance

Awards Celebration 2019

Thursday, November 21, 2019

6:00 pm. Reception

6:30 pm. Formal Program

**Celebrating 10 Years of the
Alumni Awards**



UNIVERSITY OF
WATERLOO

DIRECTOR'S MESSAGE

STEVE FORTIN, PhD, CPA, CA, ICD.D

PhD '00 | Director, School of Accounting and Finance

On behalf of myself and the School of Accounting and Finance (SAF), welcome and thank you for joining us this year for the annual SAF Awards Celebration. Our SAF family are all represented here tonight, and includes our donors and supporters, University leadership, faculty and staff, Honourees and Fellowship students, scholarship recipients, student and alumni associations, and alumni award winners. Your dedication to the School is greatly appreciated, and it is a pleasure to celebrate as a community.

This evening marks the 10th year of presenting the Alumni Awards. To commemorate this milestone, we have included two special awards: the Lifetime Achievement Award, and the International Alumni Achievement Award. It is truly an honour to have the opportunity to bring together our alumni and students, to recognize their accomplishments.

Today, we are embarking on both disruptive and exciting times. This presents an opportunity for the University of Waterloo, to poise students of this School to become the change leaders and problem solvers, in this ever-changing climate. The School continues to lead the charge with world-class programs and experiential learning opportunities for our students. With the loyal commitment and generosity of SAF alumni and donors, we are preparing our students to be adaptable, innovative, and thought leaders.

Thank you for your continued confidence in our students, in our vision, and in our community.



SUN LIFE

2019 AWARDS CELEBRATION SPONSOR



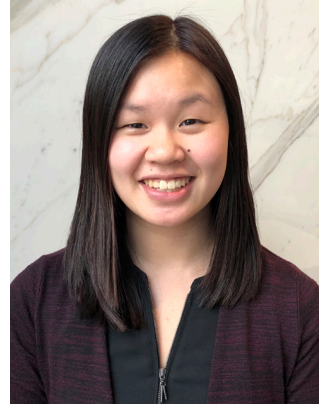
The School of Accounting and Finance would like to thank Sun Life for their sponsorship of this year's Awards Celebration.

We are grateful for the continued support from Sun Life and for their commitment to the University of Waterloo community.

MASTERS OF CEREMONIES

LAURA FONG

Laura is a 4B AFM student who has been in the Fellowship Program since her second year. She carefully organized her course load throughout her first three years at UWaterloo and was able to complete a study abroad term in Finland last fall, during which time she visited 14 countries and got a broad perspective on Scandinavian life and culture. She received the Robert J. Sproule DECA entrance scholarship and made it her mission to return to the SAF Awards Celebration each year. Throughout her undergrad, she showed her passion for student leadership and development by getting involved with the Accounting and Finance Student Association within SAF and Arts Orientation within the Faculty of Arts. She also developed a love for mentoring, which she expressed through multiple teaching assistant roles and various mentorship programs in SAF. She completed all of her co-op terms at Deloitte in downtown Toronto, and is excited to return full-time to work in their international tax group after writing her CFE in September 2020.



HECTOR GAMEZ, CPA, CMA, CBV

MAcc '12 | SAF Lecturer

Hector Gamez is a CPA, CMA, and CBV. He graduated with his BAFM and MAcc from Waterloo in 2012. He has great industry experience, with over seven years in telecommunications, customer service, and the home building industries. He has held roles such as: Senior Manager - Financial Planning & Analysis at Mattamy Asset Management; Controller – Financial Planning & Analysis at TELUS International, and he was in Mergers & Acquisition, Financial Reporting & Analysis, at TELUS.

Currently, he is a Lecturer at the School of Accounting and Finance, teaching AFM 203, 123, 102 and ACC 680. Hector is passionate about travelling, accounting & finance, education, mentoring, health & well-being, yoga, and community involvement.



ALUMNI ASSOCIATION

The School of Accounting and Finance, Alumni Association was first established in 1983 and continues to strive in keeping alumni connected, engaged and informed. The Alumni Association aims to build awareness and relationships within the corporate realm while supporting the educational experiences of students.

2019 Executive Members

President: **Elaine Lee**, BA '03

Past President: **Jesse Waltman**, MAcc '05

VP, Communications: **Arthur Wang**, MAcc '13

VP, Connections and Events: **Victoria Davies**, MAcc '88

VP, Young Alumni: **Dinesh Balakrishnan**, MAcc '14

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

ADVISORY COUNCIL

The School of Accounting and Finance Advisory Council exists to help further the goals of the School. It acts as a body of leadership, influence and support with the external stakeholders the School serves. The Council provides a link to those individuals and organizations with the resources, knowledge, and contacts that the School requires to achieve its goals.

2019 Council Members

Chair: **Glenn Ives**, BMath/CA '84

Tracy Mann, MAcc '94

Past Chair: **Upkar Arora**, MAcc '85

Ashi Mathur, MAcc '93

Joe Catalfamo, MAcc '86

Jane Skoblo, BBA '85, York University

Anish Chopra, MAcc '94

Pamela Steer, MAcc '94

Shikha Gandhi, MAcc '04

Kevin Strain, MAcc '90

Michael F. Garvey, BA '69

Benjie Thomas, BA/CA '98

Ken Grondin, MAcc '86

Ripal Patel, PDACC '00

Paul Langill, MAcc '91

Meng Wang, BAFM '12

2019 ALUMNI ACHIEVEMENT AWARD

This year we celebrate the 10th anniversary of The School of Accounting and Finance Alumni Achievement Award as the awards were established in 2009. The Alumni Achievement Award is presented to an alumnus who has distinguished themselves through their professional achievements, community involvement and public service.

MICHELLE LAM

MAcc '01 | President True & Co. (Subsidiary of PVH Corp.)

Michelle Lam founded True&Co in 2012 and successfully sold the direct-to-consumer digital intimate apparel brand to PVH Corp., the parent company of Calvin Klein and Tommy Hilfiger in 2017. The company was started in her living room, creating the very first intimate apparel Fit Quiz together with a group of women and 500 bras that she bought on her personal credit card.

Since launching, more than seven million women have taken the quiz, sharing over 200 million data points about her body, her life and her tastes. True&Co compiles this feedback and through the help of the community, drives personalized marketing and consumer-centric product design.

As a result of her consumer-driven work, Michelle was named one of Fast Company's Most Creative People, and was honored by the National Retail Federation as part of "The List of People Shaping Retail's Future."

Previously, Michelle was the first female investor at Bain Capital Ventures, where she invested in deals like LinkedIn and worked on companies like online pioneer Rent The Runway. She had previous stints at Microsoft Corporate Strategy, Boston Consulting Group and PricewaterhouseCoopers.



2019 YOUNG ALUMNI AWARD

We celebrate the 10th anniversary of The School of Accounting and Finance Young Alumni Award, as the award was established in 2009. The Young Alumni Achievement Award recognizes an alumnus who has graduated within the last 10 years or is 35 years of age or younger and who has identified themselves through their professional achievements, community involvement and public service.

AKASH KAPOOR, CPA

MAcc '14 | Digital Marketing and Product Management, Innovision App and Web Development

Akash Kapoor is presently pursuing his MBA at the Northwestern Kellogg School of Management in Chicago, Illinois majoring in Strategy and Technology Management. Previously, Akash was a Manager at Strategy& specializing in corporate and customer strategies and digital transformations for clients in the Telecommunications, Media, and Technology sector. Prior to Strategy&, Akash helped launch and scale a risk analytics platform for PwC Canada's audit practice and was recognized as an innovative leader. He was the recipient of the PwC Google Innovation Award and has presented to large audiences at several technology and analytics keynotes at PwC. Akash graduated Summa Cum Laude from the BAFM and MAcc program from the University of Waterloo in 2014 and was the National CPA Gold Medalist on the 2014 Uniform Final Evaluation.

Outside of work, Akash launched Canada's first and only CPA exam preparation iOS, Android, and Web platform in partnership with PASS consultancy (www.passyourcpa.ca). He has also continued to engage with his alma-mater as Lecturer in 2017 and more recently as the developer of a first-year accounting course for an online degree program. Akash aspires to continually engage, inspire, and imagine the unimagined as he takes on exciting endeavors in his professional journey.



INTERNATIONAL ALUMNI ACHIEVEMENT AWARD

The School of Accounting and Finance created the International Alumni Achievement Award to commemorate the 10th year anniversary of presenting the Achievement Awards. This award recognizes a remarkable international alumnus, who has distinguished themselves with world-class projects on a global scale through their professional experiences, community involvement and consistent support of the University of Waterloo.

CALVIN CHOI

BA/CA '01 | Chairman of the Board of Directors and Chief Executive Officer
AMTD Group

Calvin Choi is the Chairman and CEO of AMTD Group, and the Founder and Chairman of AMTD Foundation. He is a seasoned banker with over 20 years of experience in investment banking, international capital markets, and professional auditing sectors. In 2019, Calvin was named “Asia FinTech Leader” by the Singapore Fintech Association. In 2017, Calvin was selected as a “Young Global Leader” by the World Economic Forum. He was also selected by the Institutional Investor magazine as one of the global “Fintech Finance 35” in 2016.

Calvin currently serves as the chairman and CEO of AMTD international (NYSE: HKIB). He also serves as a board director of Bank of Qingdao Co., Ltd. (SEHK: 3866 and SZSE: 002948) and the director of ASEAN Financial Innovation Network (AFIN), which was founded by World Bank, Monetary Authority of Singapore, and ASEAN Bankers Association. Calvin is also appointed as the Vice Chairman of Greater Bay Area Homeland Youth Community Foundation, Honourable President of Hong Kong Army Cadets Association, and Vice President of Hong Kong Federation of Professions. Calvin is the Founder and Chairman of “Regional Banks+ Strategic Cooperation Alliance”, an association which was initiated by Calvin, with a number of leading Hong Kong-listed regional banks of China as members, including Bank of Qingdao, Guangzhou Rural Commercial Bank, Jiangxi Bank and Zhongyuan Bank; and the Founder and Chairman of “Greater Bay Young Entrepreneurs Association”, an organisation comprising a group of leading and innovative enterprises in the Greater Bay Area. Before joining AMTD Group, Calvin was formerly a Managing Director at the Investment Banking Division and a member of the Global Family Office Committee of UBS Asia. He also served as the China Chief Specialist, Asia Strategic Alliance under the Corporate and Investment Banking Division of Citigroup. Calvin is currently a certified bank auditor and a certified public accountant in the United States.



LIFETIME ACHIEVEMENT AWARD

The School of Accounting and Finance created the Lifetime Achievement Award to commemorate the 10th anniversary of presenting the Achievement Awards. This award honours an exceptional alumnus, who has distinguished themselves over a significant period of time through their professional experiences, community involvement, and consistent support of the School of Accounting and Finance.

MICHAEL F. GARVEY, FCPA, FCA, ICD.D

BA '69 | Retired PwC Partner

After graduating in 1969 from the University of Waterloo, Mike joined Price Waterhouse in Toronto. In July 2006, he retired as an Audit Partner. From 1976 to 1978, he was assigned to the International Firm's Continuing Education Task Force, based in London, England. Commencing in 1984, he chaired the Canadian Firm's National Continuing Education Committee until 1990. From 1995 to 2005, he developed and managed the Firm's practice in Cuba. Throughout his career, he volunteered his time to a number of organizations, including chairing the Boards of The Donwood Institute, the University of Waterloo, The Michener Institute of Applied Health Sciences, the Friends of Ontario Universities and Hospital Diagnostic Imaging Repository Services. He has chaired many audit committees since 1983, including three public companies during the past ten years.

Mike obtained his ICD.D designation in 2007. He serves as Executive Chairman and CEO of Kelvin Thermal Energy Inc. and is a Consulting Partner with Ortus Strategies (formerly FGI Europe AG).



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