Rotman-Canadian Securities Institute

Strategy & Innovation in Wealth Management: An Introduction

Canadian Securities Institute
A Moody's Analytics Company

Rotman

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Meet The Panelists

MARIE MULDOWNEY

Host/Panelist

Managing Director

CSI

MARSHALL BEYER

Host/Panelist

Credentials & Licensing Strategy

CSI

TIFFANY HARDING

CFP, TEP, FEA, CLU, CIWM, CDFA, CEA, MFA-P, FCSI

Panelist

AVP, Head of Practice Management and Wealth Planning Services

Manulife

WALID HEJAZI

Panelist

Professor

Rotman School of Management

SHARON DOOPAN

B.A (Hons) M.ED.

Panelist

Associate Director, Partnerships and Business Development

Rotman School of Management

Strategy & Innovation in Wealth Management

Rotman-Canadian Securities Institute Strategy & Innovation in Wealth Management program is a four-day symposium offering a mix of academic insight based on the latest research and practical experience, designed to provide learners with a comprehensive, integrated, and strategic approach to wealth management.
The core curriculum includes:

- Client specialization and focus
- Human and family dynamics
- Wealth management strategies
- Legacy planning and Growth

The program will take place in Spring 2023 and is designed to support financial services professionals as they continue to address frequent financial upheavals and evolving technologies while serving high net worth clients.

To learn more, visit: https://www.rotman.utoronto.ca/ProfessionalDevelopment/Executive-Programs/Programs-Individuals/Wealth-Strategy

Q&A and Contact Details

Questions for CSI?

Email designations@csi.ca

Questions about the Program?

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Thank you