



## PROFILE:

I am a researcher, writer, speaker and educator... with deep knowledge on topics related to women and finance.

I love to share global insights into how smart women **think** and **act** about money.

I want to make the world of finance a positive place for all women and I want to educate the business world to be better positioned to understand the female customer.

I share my research findings and comment regularly for print, radio and television media around the world. I release my annual research findings based on 50 in-depth interviews with global leaders on topics related to women and finance on every International Women's Day. On March 8, 2017 I released my seventh white paper in the *Rich Thinking* series.

I am an approved speaker for the CFA (Chartered Financial Analyst) Institute and I have delivered keynote presentations at over 25 CFA Society events globally as part of the CFA Women in Investment Management Initiative.

I am a currency expert and portfolio manager with 25 years' experience in the investment industry.

I was a lecturer for the CFA (Chartered Financial Analyst) Society in Toronto as well as the CFP (Certified Financial Planner) college program in Toronto.

I was featured in a full page story as one of "the influential women in business" in Iceland's largest weekly newspaper *Vískaftablaðið* in April 2014.

I was named one of "Five Women to Watch" in CFA Society Toronto's magazine *The Analyst* in March 2015.

## EDUCATION:

September, 1999      **Chartered Financial Analyst** designation – CFA Institute  
April, 1984          **Bachelor of Commerce** degree – Ottawa University

**WORK HISTORY:**

*September, 2006 – November, 2016*

**Cumberland Private Wealth Management Inc.**  
Partner and Portfolio Manager

*July, 1999 – August, 2006*

**Toron Capital Markets Inc.**  
Partner

*August, 1996 – July, 1999*

**Bank of Montreal**  
Investment Counsellor

*August, 1991 – July, 1996*

**Bank of Montreal**  
Institutional Foreign Currency Sales

*January, 1990 – July, 1991*

**King Ranch Spa & Resort**  
Corporate Sales

*April, 1986 – December, 1989*

**Xerox Corporation**  
Sales Representative

*April, 1984 – April, 1986*

**Export Development Corporation**  
Export Insurance Officer

**SKILLS & INTERESTS:**

See [www.barbarastewart.ca](http://www.barbarastewart.ca) for all research, articles, videos and media coverage.