



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 will release 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 20 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 for all research, articles, videos and media coverage.