



CFA Society Orange County

Rich Thinking 2016: How Smart Women Are Shaping the Future of the Finance Industry Barbara Stewart, CFA

**Partner and Portfolio Manager, Cumberland Private
Wealth Management**

**June 2, 2016: 5:30 - 7:30 p.m.
The Pacific Club, Newport Beach**

Barbara Stewart, CFA, author of the Rich Thinking series of white papers on women and financial issues, will explore the research findings from her sixth study "How Smart Women Are Shaping the Future of the Financial Industry". Barbara will elaborate on the themes of her research: **Finance is the new black; Every industry is the financial industry, Money still talks...but the conversation has changed; Follow movement: behaviour drives financial outcomes; The business of advice goes to extremes; and The joy of finance**, featuring insights from more than 50 male and female thought leaders around the world.

Barbara's unique approach puts it all in language that welcomes both women and men; senior executives or more junior workers hoping to learn; and both those with a corporate focus as well as those who are looking for personal insights.

Barbara Stewart, CFA
Partner and Portfolio Manager
Cumberland Private Wealth Management

Mrs. Stewart has been advising high net worth entrepreneurs, executives and families for nearly 20 years, building strategies that reflect her client's values and investment objectives. Her responsibilities include portfolio management and new business development. Prior to Cumberland, Mrs. Stewart worked as an investment counselor for high net worth clients at a private, Toronto based investment firm, and before that on the institutional foreign currency-trading desk for BMO Nesbitt Burns. She is a shareholder of Cumberland Partners Limited, the firm's parent company. Mrs. Stewart has conducted significant research in the area of women and finance, she writes and is frequently quoted in the media - see www.barbarastewart.ca. Mrs. Stewart is a frequent keynote speaker at global events relating to women, money and financial literacy, participating in events on three continents.



Registration is open!

Thursday, June 2, 2016

5:30 - 7:30 p.m.

The Pacific Club

4110 MacArthur Boulevard, Newport Beach, CA 92660

Hors d'oeuvres, wine and soft beverages will be served.

Parking is complimentary.

For a map and directions [click here](#).

Members, Non-members, Students, Candidates: \$25.00

REGISTER HERE

CE CREDIT:

As a participant in the CFA Institute Approved-Provider Program, the CFA Society Orange County has determined that this program qualifies for 1.0 credit hour. If you are a CFA Institute member, CE credit for your participation in this program will automatically be recorded in your CE Diary.