



## 2024 Peak Awards Nominations

### Instructions and procedures

Peak Awards Ceremony: **May 8, 2024**

Deadline for Nominations: **December 15, 2023**



# About the Association of Women in Finance

The Association of Women in Finance (AWF) is a non-profit organization dedicated to supporting the advancement of women in the field of finance. We are executives, bankers, lawyers, accountants, analysts, investment professionals, actuaries, venture capitalists, insurers, and entrepreneurs. We work in both private and public practice across a wide range of industries. Our mission is to encourage women to enter and advance in the field of finance; involve, connect, and develop women in the business community; and to recognize and endorse women in finance who have achieved excellence. Since 1996, we have been honouring the success of women in finance, supporting their advancement throughout their careers, and serving as a convener of knowledge.

## What are the PEAK Awards

Performance. Excellence. Achievement. Knowledge (PEAK). These are the qualities celebrated by the AWF at the highly-anticipated annual PEAK Awards. Join us on May 8th, 2024 as we host the PEAK Awards honouring outstanding individuals in the field of finance. The Peak Awards also honour the deserving recipients of the AWF's scholarships and serve as an important opportunity for the AWF to fundraise for the scholarship fund.

At our 26<sup>th</sup> annual PEAK Awards, we will honour five individuals in the following categories, who have made a positive impact on British Columbia's finance community:

- Rising Star;
- Excellence in Industry;
- Lifetime Achievement;
- \*Champion; and
- Significant Board Contribution.

\*A Champion honouree is a professional of influence, either female or male, who furthers the advancement of women in finance for leadership positions in management or on boards.

For over two decades, the PEAK Awards have honoured talented, respected and deserving women and men who combine professional excellence with a passionate commitment to championing women in the workplace. We invite you to join us for a memorable evening as we celebrate the PEAK Awards honourees and support changing the landscape of women in finance.



## Eligibility

To be eligible to receive a PEAK Award, the Nominee must:

- Live and work in British Columbia.
- Be currently or recently employed in the field of finance or retired from the field.

The "field of finance" is defined broadly and includes, but is not limited to, educators, public service employees, finance professionals, including accountants, CFAs, CFPs, CBVs, actuaries, bankers, CFOs, CEOs and lawyers (such as corporate finance, business, securities, real estate, tax and financing).

- Satisfy each of the criteria for her/his PEAK Award category as listed below.
- Consent, in writing, to the nomination and the publication of her/his name, photo and biographical information, if chosen as the successful honouree.
- Be available to attend the PEAK Awards on the evening of May 8th, 2024 and a dress rehearsal earlier that day.
- Honourees will automatically be enrolled in the AWF Alumni Network which includes invitations to Alumni events and information about other Alumni initiatives.
- Not be a staff member of the AWF or a current Director of the AWF.



# Categories



**Rising Star** PEAK Nominee is a female finance professional or woman in the field of finance who:

- is under 40 years of age (please provide birthdate);
- **70%:** an emerging leader who has made meaningful professional contributions to her institution, industry and professional community that are outstanding and unique;
- **15%:** guides, supports and encourages the promotion/advancement of women; and
- **15%:** actively involved in her personal community.



An **Excellence in Industry** PEAK Nominee is a female finance professional or woman in the field of finance who:

- has shown excellence in her industry, sector or field in recent years;
- **60%:** demonstrates a high and quantifiable contribution to her company, industry and professional community;
- **20%:** guides, supports and encourages the promotion/advancement of women; and
- **20%:** actively involved in her personal community.



A **Lifetime Achievement** PEAK Nominee is a female finance professional or woman in the field of finance who:

- has 30+ years of experience;
- demonstrates an enduring commitment to achieving excellence;
- guides, supports and encourages the promotion/advancement of women;
- is actively involved in her professional or personal communities; and
- is described as a leader, ground-breaker, or visionary by her peers.



A **Champion** PEAK Nominee is a professional of influence, either female or male who:

- furthers the advancement of women in finance for leadership positions in management or on boards;
- has sponsored women in finance, putting her/his reputation on the line to advocate for change and the advancement of these women;
- has seen women that she/he mentored progress into position of leadership; and
- is actively involved in her/his professional or personal communities.

The Champion Nominee should have at least one external reference letter from a woman who has been sponsored by the Champion and if submitting two external references letters, another from a woman who has been positively influenced by the Champion in her career.



A **Significant Board Contribution** PEAK Nominee is a female finance professional or woman in the field of finance who:

- **60%:** has made meaningful contributions for the board she works with that are outstanding and unique whether it is on a not-for-profit, public or private board;
- **30%:** has shown significant leadership, oversight and/or stewardship on her board; and
- **10%:** has seen the board that she works with progress or advance during the time of her involvement.

# Nominations Process

## Nomination Process

There are **four** parts to this Nomination Form. Given the timing required to obtain external reference letters, please feel free to save and continue as needed and submit when you have all information completed and have obtained all supporting materials.

To make a nomination you must complete the following sections in the online Nomination Form and provide us with the required supporting documentation (as attachments in the online portal):

### Part 1 – Nominee and Nominator Information

Please complete all Nominee Information, Nomination Information, PEAK Award Category and Previous Nomination Information.

**Note:** One (1) Nomination per PEAK Award category. If a Nominator wishes to nominate the Nominee in more than one (1) PEAK Award category, the Nominator will need to submit a Nomination Form for the Nominee for each PEAK Award category.

### Part 2 – Resume or Summary of Employment

Please either complete the Summary of Employment for the four most recent employment positions for the Nominee **or** provide us with an up-to-date resume for the Nominee (1-2 pages).

### Part 3 – Narratives

- **Professional Narrative**

This is the Nominator’s opportunity to discuss how the Nominee meets the specific PEAK Award criteria for the PEAK Award category. In writing the Professional Narrative consider the questions outlined in Schedule “A” attached hereto for the applicable PEAK Award category. While these questions are provided as a guideline, you may respond directly to each question to complete the Professional Narrative.

Give consideration to the respective weightings attributed to each of the criteria (ie. contribution to: professional community; personal community; advancement of women). Please provide specific examples and where relevant, financial metrics such as: size of company, financial and other impact created, number of people managed, size of projects and performance indicators used.

The **narratives and metrics are critical** evaluation tools for the independent panel of judges to examine and compare each Nominee. Take this opportunity to “tell the story” behind the Nominee.

Please limit your response to **750 words**.

Examples of Professional Narratives can be found at Schedule “B” attached hereto.

- **Personal Narrative**

This is the Nominator's opportunity to provide some personal colour about the Nominee (hobbies, interests, family, etc.) and highlight the Nominee's personal activities in the community.

Please limit your response to **250 words**.

Examples of Personal Narratives can be found at Schedule "C" attached hereto.

#### **Part 4 – External Reference Letters**

Please list a minimum of **two** and a **maximum of three individuals** who will submit written external reference letters.

Consider the following when selecting references:

- the Nominee's **industry** involvement;
- the Nominee's **community** involvement;
- individuals that have been **positively influenced** by the Nominee; and
- clients, customers or others who have **worked** with the Nominee.

Reference letters should provide examples or metrics that support the Nomination and personal colour around why the Nominee meets the PEAK Award criteria for the PEAK Award category that the Nominator has nominated the Nominee for.

A **Nominee in the Champion** category should have at least one external reference letter from a woman who has been sponsored by the Champion and another from a woman who has been positively influenced by the Champion in her career.

The fully completed Nomination Form must be submitted via the online form with all supporting documentation (including reference letters) by **Friday, December 15, 2023**. Supporting documents should be attached to the online submission.

#### **Judging and Evaluation Process**

All complete and eligible Nominations are forwarded to an independent judging panel composed of finance professionals at various stages of their careers. The judging panel will be chaired by the AWF PEAK Director of Nominations. The AWF reserves the right to move Nominees into another PEAK Award category if it is deemed suitable.

#### **Successful Honourees**

The successful PEAK Award honourees will be notified prior to the awards and individually honoured at the PEAK Awards.

#### **Tickets to the PEAK Awards**

PEAK Award honourees attend the PEAK Awards on May 8, 2023 as guests of the AWF. We encourage friends, family and colleagues to attend as well but given the AWF is a non-profit organization we are unable to provide complimentary tickets to supporters of honourees.



# Past Peak Award Honourees

## Lifetime Achievement

2023 - Mary Vellani - Senior Manager Cash Management, TD Bank Group  
2022 - Julia Kim - Former VP and Investment Counsellor, RBC Philips, Hager & North Investment Counsel Inc.  
2020/2021 - Cynthia Lim, CFO and Partner, PCI Developments  
2019 - Susan Chortyk, Founding Partner and Vice-President (retired), PBI Actuarial Consultants Ltd.  
2018 - Bev Briscoe, Corporate Director  
2017 - Geri Prior, Board Director  
2016 - Maureen Howe, Corporate Director  
2015 - Joanne Gassman, Senior Vice President, Women's Market, BMO Bank of Montreal  
2014 - Anne Lippert, Principal, Anne Lippert Consulting  
2013 - Shelley Brown, Partner, Deloitte  
2012 - Anne Stewart, Partner, Blake, Cassels & Graydon LLP  
2011 - Nancy McKinstry, C.M., Chair of the Board of Directors, ICBC and Founding Member, Minerva Foundation  
2010 - Sarah Morgan-Silvester, Chancellor - UBC  
2009 - Virginia Greene, President & CEO - Business Council of BC  
2008 - Carol Newell, Principal - Renewal Partners  
2007 - Doreen McKenzie-Sanders, Executive Director - Women in the Lead  
2006 - Wendy McDonald, Chairman - BC Bearing Engineers Ltd.

## Excellence in Industry

2023 - Maria Pacella - Managing Partner, Pender Ventures  
2022 - Sophia Tsui - Chief Risk Officer, HSBC Bank of Canada  
2020/2021 - Nancy Harrison, Investor, Executive and Mentor; Life Sciences BC, ad Mare BioInnovations, Knight Therapeutics & Creative Destruction Labs  
2019 - Tamara Vrooman, President and CEO, Vancity Credit Union  
2018 - Shannon Rogers, President & General Counsel, Global Relay

## Rising Star

2023 - Amina Valli-Hasham - Director & Group Leader, Canadian Business Banking, Scotiabank  
2022 - Aanu Adeleye - Senior Manager, KPMG LLP  
2020/2021 - Kylie Dickson, Audit Committee Chair, Fortuna Silver Mines  
2019 - Abigail Ma, Director, Financial Planning and Analysis, British Columbia Lottery Corporation  
2018 - Jayana Darras, Partner, Deloitte  
2017 - Jodi Moss, Partner, KPMG  
2016 - Michelle Grant, Partner, Ernst & Young  
2015 - Lana Kirk, Partner, PwC  
2014 - Miranda Lam, Partner, McCarthy Tetrault  
2013 - Julie McGill, Director, CAI Capital Management Co.  
2012 - Christine Bergeron, Investment Manager, Vancity Capital  
2011 - Lisa Skakun, General Counsel & Corporate Secretary, Coast Capital Savings Credit Union

## Champion

2023 - Dale Telfer - Region Vice President, Commercial Real Estate Finance, HSBC  
2022 - David Budd - Deputy Managing Partner, Cassels Brock & Blackwell LLP



### **Significant Board Contribution**

2023 - Catherine Heath - Vice President, Portfolio Manager, Leith Wheeler Investment Counsel Ltd.  
2022 - Nancy McKenzie - Corporate Director & Strategic Advisor, Numerous Boards across Western Canada  
2020/2021 - Catherine McLeod-Seltzer, Chair, Kinross Gold Corp  
2019 - Annalisa King, Chair of Governance Committee & Director, Vancouver Airport Authority, Director: Saputo Inc., The North West Company, and First Capital Realty Inc.  
2018 - Angela Kaiser, Corporate Director

### **Excellence in the Private Sector** (Award category retired and combined together within Excellence in Industry)

2017 - Sue Paish, CEO, Lifelabs  
2016 - Karla McCarthy, Director, BMO  
2015 - Kathy Butler, Managing Director and Head, Wholesale Banking - British Columbia, CIBC  
2014 - Sandra Stuart, COO, HSBC Bank Canada  
2013 - Gail Edwards, President, JH Investments Inc.  
2012 - Jane Russell, Senior Vice President, TD Canada Trust, Pacific Region, TD Bank Group  
2011 - Bev Park, President & COO, Couverdon Real Estate

### **Excellence in the Public Sector** (Award category retired and combined together within Excellence in Industry)

2017 - Brenda Liggett, CFO, Fraser Health Authority  
2016 - Carolyn Rogers, CEO of the Financial Institutions Commission  
2015 - Cathy McLay, CFO, Translink  
2014 - Jacqueline Hogan, CFO, University of the Fraser Valley  
2013 - Cheryl Yaremko, EVP Finance & CFO, BC Hydro  
2012 - Stephanie Sharp, President, Ferax Consulting Corp.  
2011 - Dr. Patricia Hibbitts, Vice President, Finance & Administration, Simon Fraser University

### **Community Legacy** (Award category retired)

2014 - Virginia Weiler, Chair, Vancity Board of Directors & Consultant  
2013 - Elise Rees, Partner, Ernst & Young, LLP  
2012 - Joanne Hausch, Associate Partner, Tax, Deloitte & Touche, LLP  
2011 - Christina Anthony, Director, Odium Brown Limited and Founder & Chair, Forum for Women Entrepreneurs

### **PEAK Performance & Excellence Honourees** (Award category retired)

2010 - Patrice Impey, CFO and General Manager of Financial Services and Human Resources - City of Vancouver  
2009 - Elizabeth J. Harrison, Q.C., Partner - Farris, Vaughan, Wills & Murphy LLP  
2008 - Tracey McVicar, Managing Partner - CAI Capital Management Co.  
2007 - Catherine McLeod-Seltzer, Executive Chair and Director - Pacific Rim Mining Corp.  
2006 - Gail Stephens, CEO - BC Pension Corp.

### **PEAK Knowledge & Leadership Honourees** (Award category retired)

2010 - Sue Hutchison, Senior VP & Head of Commercial Banking, BC Region - HSBC Bank Canada  
2009 - Eleanor M. Joy, Associate Partner - PricewaterhouseCoopers LLP  
2008 - Elaine Reynolds, Principal - Legacy Tax + Trust Lawyers  
2007 - Tamara Vrooman, Deputy Minister and Secretary to the Treasury Board - BC Ministry of Finance



[www.womeninfinance.ca](http://www.womeninfinance.ca)

## **Schedule “A”**

### **Professional Narrative – Questions to Consider**

#### **Rising Star**

1. Explain why you consider the Nominee an early leader and describe how the Nominee has made meaningful professional contributions that are outstanding and unique.
2. Provide us with an example (or examples) where the Nominee has guided, supported and encouraged the promotion of women.
3. Tell us about the Nominee’s professional and personal involvement in her community.

#### **Excellence in Industry**

1. Explain how the Nominee has shown excellence in her industry, sector or field in recent years.
2. Describe how the Nominee has demonstrated a high and quantifiable contribution to her company, industry and professional community.
3. Provide us with an example (or examples) where the Nominee has guided, supported and encouraged the promotion/advancement of women.
4. Tell us about the Nominee’s personal involvement in her community.

#### **Lifetime Achievement**

1. Describe how the Nominee has demonstrated an enduring commitment to achieving excellence.
2. Provide us with an example (or examples) where the Nominee has guided, supported and encouraged the promotion of women.
3. Tell us about the Nominee’s professional and personal involvement in her community.

#### **Champion**

1. Describe how the Nominee has furthered the advancement of women in finance for leadership positions in management or on boards.
2. Provide us with an example (or examples) where the Nominee has sponsored women in finance, putting her/his reputation on the line to advocate for change and the advancement of women.

3. Has the Nominee seen women that she/he mentored progress into a position of leadership? If so, tell us about this.
4. Tell us about the Nominee's professional and personal involvement in their community.

### **Significant Board Contribution**

1. Provide us with an example (or examples) of how the Nominee has made meaningful contributions to the board she is working with that are outstanding and unique (whether it is a not-for-profit, public or private board).
2. Describe how the Nominee has shown significant leadership, oversight and/or stewardship on her board.
3. Has the board the Nominee works with progressed or advanced during the Nominee's involvement? If so, tell us about this.

## **Schedule "B"**

### **Sample Professional Narratives**

#### **EXAMPLE 1**

Nominee Name: Jane Smith\*

Professional Narrative – Max 750 words

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Jane received her degree in Business Accounting at the University of British Columbia in ♦ and shortly thereafter she began working at *ABC Company*. As the most junior associate, she eventually became a team leader, then a people manager and eventually an employer.

When she first started her career, there were only three women in the accounting support area (and no men) and each of the women had an assigned day to complete tasks such as filing, typing and making coffee or running errands for the men in the office.

Writing the accounting exams while working was not easy and it took Jane awhile to complete these, but perseverant and determined, Jane received her designation in ♦. She was then put in charge of the study policy at *ABC Company* and used her own experience as an example for employees struggling with the exams. Note that there are currently ♦ accountants working in Canada, ♦ of these accountants are working BC and less than ♦% are women.

When she qualified as an accountant she was the only female accountant in BC and she had a difficult time in the office adjusting to being a part of an "old boys club". Despite this, Jane didn't give up on being



included in the decision making process along the way. Throughout her career, she has acted as a mentor to young women in the profession.

Hardworking, brilliant and loyal, Jane became an account manager in ♦ for *ABC Company's* largest client, *XYZ Company*. Though her role was initially supposed to be temporary, she managed to understand the needs of *XYZ Company* in her own way. This level of client service eventually resulted in *XYZ Company* following Jane over to *DEF Company* once it was created.

The idea of *DEF Company* was formed in ♦, when *ABC Company* decided to get out of the business of servicing clients involved in certain types of business. After many years of working at *ABC Company* and much to Jane's surprise, she was being sold to the highest bidder. Rather than sit around, Jane and two of her male colleagues decided to start their own accounting firm, *DEF Company*. The first thing Jane and her partners agreed on was that they would do things differently than other accounting firms. They wanted to create an employee-owned company where individuals would have the opportunity to grow in a supportive environment, be rewarded fairly for their contributions and be able to have a proper work-life balance and most importantly, without any discrimination based on gender. When *DEF Company* was formed, Jane and her partners decided on salaries for all employees and themselves. Jane was able to have transparent and open discussions with her partners and negotiated an equal salary to her partners.

Jane would not admit it but the fact that she was willing to take the risk of founding *DEF Company* actually convinced many employees to join. *DEF Company* opened for business in ♦ with only ♦ employees in Vancouver.

In 2019 Jane is the president of *DEF Company* which consists of approximately ♦ employees, ♦% of which are women. *DEF Company* now has ♦ accountants, half of them being women. *DEF Company* revenues have grown from \$♦million to \$♦ million. Furthermore, more than ♦% of these revenues were generated under the direct management of Jane. From a handful of clients, *DEF Company* has grown its client base to over ♦ clients. Jane has had quite an amazing career, for a woman who managed her career and her business with her heart first.

\*Note that the Professional Narrative above has only been provided as a sample. The information and facts are fictional and should not be used or relied on in any way.

## **EXAMPLE 2**

Nominee Name: John Smith\*

Professional Narrative – Max 750 words

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John Smith, ♦, is known as a remarkable force for the advancement of women at *ABC Company* and in the business community for several reasons.

First, when he encounters talented, determined, women professionals, he personally wants to see them succeed. Whether personally mentoring them, tapping them into his network, or bringing them up

through client teams, John is committed to helping them grow and succeed in their careers as much as he did. Because he remembers how critical this kind of support was for his own path to leadership.

Then, there's his leader's view that diversity and inclusion depend on organizational support and flexibility. That achieving career and leadership goals are tough enough, but achieving life and personal milestones at the same time can be even more challenging. Whether as working parents; individuals managing other, equally vital personal ambitions; those who want to give back to communities; or women making important lifestyle choices to enhance their wellbeing, John believes everyone deserves the chance to succeed. And if that requires support from *ABC Company*, John is dedicated to ensuring he and the firm provide it.

He regularly advises women executives and senior managers at *ABC Company* to "un-balance" at the right times, putting extra focus during critical moments in either their careers or their personal lives, so they can succeed in both realms. John's is a long-term view - one that wants potential women leaders never to have to choose between life and career.

"There are times when someone needs to re-balance parts of their lives, whether as a working parent or focusing on other life priorities, and if we can't be flexible to support these shifts in focus, we end up losing a great professional who, if we had a better support strategy, could have developed as a remarkable leader over the ensuing years," says John. "These are 35 year careers. We need to be smarter, to figure out how to re-balance and support that period of time where we're otherwise losing very capable women. That's the business imperative - keeping our best professionals with enough flexibility to create long-term, fulfilling careers building to leadership."

As a leader who puts his reputation on the line to advocate for change and the advancement of women, John has championed several women who have since become senior executives at *ABC Company* including ♦, ♦, ♦, and ♦.

He is also the lead executive on all-women teams serving customers including, for example, ♦, and ♦, and is a role model for his colleagues and customers. One customer said that because of John's great listening skills and welcoming style, she's "never shied away from bringing new discussions to him and have him work through them" with her. As well, she says, "it's incredibly positive, valuable and rewarding as a customer to see women moving into senior executive roles at *ABC Company*. The *ABC Company* is seen as a very positive place to work as a woman and that's a direct result of John's efforts."

John's influence on the advancement of women at *ABC Company* is most evident in the ♦ company, which he led from ♦ to ♦ and grew its senior executive ranks from ♦ (♦%) to ♦ (♦ %), and company office now has ♦ women in senior executive roles. Much of that success is due to John's unfailing commitment to supporting the needs of women in ♦.

As managing director at *ABC Company*, John prioritizes budget for women's initiatives like *ABC Company's Women Leadership* program, which supports women as they progress through management roles, and his visible support of programs like this is respected across the firm.

He's personally involved and ensures *ABC Company* financially supports women's community organizations including ♦; ♦; ♦; ♦; and ♦. He also attends and participates in many of these organizations' events because he understands how important it is to visibly demonstrate *ABC Company's* support in the market.

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## **Schedule "C"**

### **Sample Personal Narratives**

#### **EXAMPLE 1**

Nominee Name: Jane Smith\*

Personal Narrative – Max 250 words

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Jane's business accomplishments are accompanied by a true sense of service and a commitment to making life better for others.

Jane has generously supported and provided leadership for fundraising initiatives to help others in her community and abroad. These initiatives include ♦, ♦ and ♦. These initiatives all promote education, training and resources for those less fortunate and many of these initiatives are specifically targeted towards women. In addition, she generously supports a number of charities in BC and across Canada. Jane is currently volunteering her time with the *GHI Association*. The *GHI Association* has a goal of making accessible and available social programs to help local residents in Vancouver.

In her spare time, Jane enjoys travelling (she has visited all seven continents and more than 50 countries), collecting antiques, singing and crafting. Each year Jane makes and donates more than 3,000 jars of jams, pepper jelly and pickles to the Christmas Fair with all proceeds going to local charities. Jane lives in Burnaby with her family and two dogs rescued from the SPCA.

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## **EXAMPLE 2**

Nominee Name: John Smith\*

Personal Narrative – Max 250 words

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Over the past decade, John has volunteered on Boards and Executive Committees of ♦, ♦, and ♦ and has contributed to many other organizations. From ♦ to ♦ John served as Governor of the *XYZ Association*, and during that same period until ♦ he was also Audit Committee Chair for *XYZ Association*, helping restructure *XYZ Association* into a centralized national organization, improving remittances to international programs. In ♦ John was recognized as a ♦ and has since served on the *DEF Committee*. In ♦, he became a ♦ for *GHI Committee* and for the *JKL Network*.

John has also spearheaded various *ABC Company* volunteer and fundraising efforts, including four consecutive "123 Challenge" events in support of ♦ including sponsoring, fundraising and organizing riding teams, increasing fundraising outcomes from the event from \$♦ to over \$♦ million by ♦.

To relax, John sails and skis, and travels annually to spend time with family. John is married to Katie, an event planner, and together they have two children - Jane, a student at ♦; and Michael, a student in high school. John is passionate about innovation, impact, and diversity, and personally champions community and workplace inclusion, sharing his story within the firm and externally, to promote inclusion, understanding, and authenticity.

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