



## Historical Returns

	Historical Rate of Return (%)	Three Year Average (%)
1998	5.26	
1999	7.68	
2000	7.67	6.87
2001	0.07	5.14
2002	(4.20)	1.18
2003	10.61	2.16
2004	7.79	4.73
2005	11.70	10.03
2006	11.67	10.39
2007	0.07	7.81
2008	(12.06)	(0.11)
2009	13.80	0.60
2010	9.30	3.68
2011	(0.92)	7.39
2012	7.36	5.25
2013	13.48	6.64
2014	8.29	9.71
2015	2.66	8.14
2016	7.54	6.16

## Current Investment Committee Members

**Chair: Chris Chard**, MBA, CFP, CLU, FCSI, Investment Advisor, Stonehouse Financial Advisory Services

**Investment Advisor: Marc LeBlanc**, MBA, CIM, FCSI, Investment Advisor, Portfolio Manager, Vice President, CIBC Wood Gundy

**Tina Bailey**, MPA, MBA, Executive Director, CFKA

**Chris Clayton**, CIM Investment Advisor, BMO Nesbitt Burns

**Louis Gagnon**, PhD, Distinguished Faculty Fellow of Finance, Smith School of Business, Queen's University

**Tim Kingston**, BCom, Vice President and Financial Consultant, CIBC Wood Gundy (*retired*)

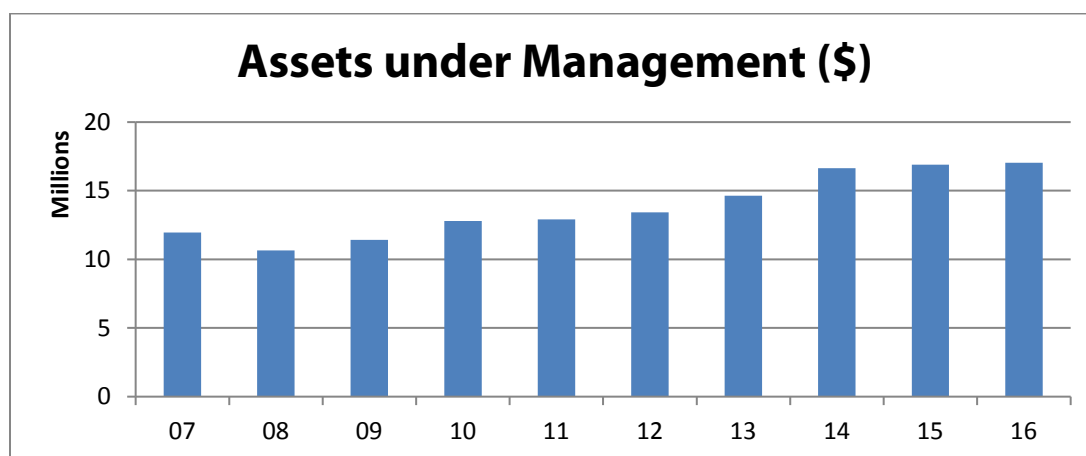
**David Leeson**, MSc, Community Member

**Scott Miller**, CIM, Branch Manager, ScotiaMcLeod

**Lynnette Purda-Heeler**, PhD, CFA, Associate Professor and RBC Fellow of Finance, Smith School of Business, Queen's University

**Jay Rayner**, Investment Advisor, Assante Capital Management

**Josée Thériault**, CIM, FCSI, PFP, Portfolio Manager & Wealth Advisor





## Investment Committee Member Biographies

### **Chair: Chris Chard, MBA, CFP, CLU, FCSI**

For over twenty years, Chris has worked in the financial services industry in Kingston. He is the President of Stonehouse Financial Advisory Services, an independent personal financial planning organization. Chris holds a Bachelor of Commerce degree from Concordia University, and an MBA from Dalhousie University. He also holds many industry designations. In addition to his volunteer work with CFKA, Chris volunteers with Advocis, a national association of financial advisors, and Kingston Blue Marlins.

### **Investment Advisor: Marc LeBlanc, MBA, CIM, FCSI,**

### **Investment Advisor, Portfolio Manager, Vice President, CIBC Wood Gundy**

Marc has been an investment advisor since 1994. His expertise in the industry is Canadian equities and discretionary portfolio management.

### **Chris Clayton, CIM**

Chris started in the financial services industry in 2008 and joined BMO Nesbitt Burns in 2010. Chris is a Certified Investment Manager (CIM) and also an Insurance Advisor with BMO Nesbitt Burns Financial Services Inc. He co-ordinates account strategy and provides financial and investment advice. Chris attended the University of Western Ontario receiving a Bachelor Degree in Business.

### **Louis Gagnon, PhD**

A Professor of Finance and Distinguished Faculty Fellow teaching derivatives and risk management at Queen's Smith School of Business, Louis holds a PhD (Toronto), an MSc, and a BBA (Sherbrooke). He was presented the Master of Finance Instructor of the Year Award in 2013 and 2015. Louis's research is published in leading finance journals. He is also a consultant and an executive educator. Previously in senior management at RBC, Louis oversaw the bank's global interest rate derivatives exposures and developed risk management methodologies and policies.

### **Tim Kingston, BCom**

Born and raised in Kingston, Ontario, Tim obtained a Bachelor of Commerce degree from Queen's University in 1976. He spent thirty-two years working as an investment advisor for CIBC Wood Gundy, Merrill Lynch and Walwyn Stodgell. He was Branch Manager and Vice-President of Merrill Lynch and Walwyn Stodgell. Tim retired in 2008 and is currently co-owner of Smoke's Poutinerie in Kingston. He has been a member of the Investment Committee since its inception in 1998.

### **David Leeson, MSc**

David is a Queen's MSc graduate and an active member of the community. He has served as Treasurer for several charitable and non-profit organizations including Sunnyside Children's Foundation whose funds are now managed by the Foundation. David has successfully completed the Canadian Securities Course and Life License Qualification Program.

### **Scott Miller, CIM**

Scott is the Director and Branch Manager of Ottawa and Kingston Branches for Scotia Wealth Management. He started in the Investment Management business in 1992.

### **Lynnette Purda-Heeler, PhD, CFA**

Lynnette is an Associate Professor and RBC Fellow of Finance at Smith School of Business, Queen's University where she teaches corporate finance and portfolio management in the MBA and Masters of Finance programs. She holds a PhD in Finance from the University of Toronto and is a Chartered Financial Analyst. Prior to her PhD, Lynnette worked in the finance industry as an Investment Banking Analyst. Lynnette currently sits on the Board of QUIC, an \$875,000 portfolio managed by Queen's students.

### **Jay Rayner**

Jay is an established and skilled Investment Advisor at Assante Capital Management with eight years of experience focusing on managing investments and wealth for a diversified clientele. Jay sits on a number of boards and committees focused on fundraising and community advocacy.

### **Josée Thériault, CIM, FCSI, PFP**

Josée joined the RBC Financial Group in 1986. She offers clients nearly thirty years of experience in the financial industry. Josée enjoys sharing her knowledge and insights with clients while helping them to build wealth through conservative and balanced portfolios. Josée is an active member of the Kingston community; for her, helping those in need by getting involved in community organizations, either through volunteering or by making a financial contribution, is a very rewarding experience.