



THURSDAY, MAY 10TH, 2018 WOMEN, WISDOM & WEALTH

Women control more wealth today than ever before, a trend that is expected to continue. How do you ensure that philanthropy becomes a consistent discussion point by industry professionals with their clients and/or donors? Are professionals engaging in the kind of conversations that donors want to have?

Please join us to hear from a panel of influential women who will share their insights into different motivations for giving, how to have the philanthropic conversation with clients, and reflect on their own personal experiences.

WOMEN, WISDOM & WEALTH Panelists

Viola Vanderuyt, FCSI, CIM, CPCA, National Bank Financial


Charlotte Salomon, Q.C., Senior Partner, McConnan Bion O'Connor & Peterson

Alexandra (Ali) Edgell, CIM, FCSI, Vice President, BMO Nesbitt Burns

Sara Neely, LL.B., Director of Philanthropic Services, Victoria Foundation

Sybil Verch, CIWM, FCSI, CIM, SVP, National Director Wealth Management, Raymond James Ltd.

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Legacy Sponsor:  **University of Victoria**

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7:15 AM
REGISTRATION
7:30 AM
BUFFET BREAKFAST
8:00 – 9:00 AM
PRESENTATION

CENTENNIAL
BALLROOM
UNION CLUB
805 GORDON ST.
VICTORIA, BC
MAY 10, 2018

FREE EVENT
RSVP EARLY AS
SPACE IS LIMITED

PLEASE RSVP BY
MAY 4, 2018

<https://www.cagp-acpdp.org/en/events/women-wisdom-wealth>



WOMEN, WISDOM & WEALTH Panelists

Moderator: **Viola Vanderuyt**



In over 25 years working in the field of wealth management, Viola has observed women becoming wealthier and wiser. Less common in previous generations, many of us have worked hard to accumulate our wealth independently from our spouses. While men and women are concerned about their post-retirement finances, Viola has observed that we as women experience unique realities. We find ourselves caring for our children nearing adulthood as well as for ageing parents, balancing a career, multi-generational family needs, and our own priorities like our health, wealth and lifestyle require women to be skillful and dedicated multitaskers. We have worked hard to earn our income, and we want to be sure we can prioritize everything that is important to us when we finally have time to slow down and enjoy it. Viola specializes in the distinct needs of women planning for retirement. She has dedicated her career to establishing her expertise in an industry still considered prominently male, and she is honoured to serve women who have also paved their own paths. Currently, Viola is President/Chair of the Saanich Peninsula Community Foundation and an active volunteer for many other organizations.

Lawyer: **Charlotte Salomon**



Charlotte began her legal career as an articulated student with McConnan Bion O'Connor & Peterson in 1995. She was called to the British Columbia Bar in 1996 and been with that firm ever since. Charlotte provides her clients with a wealth of knowledge and experience in the areas of wills, estate administration, and personal injury litigation. She also practices in property transactions, including real estate conveyance, foreclosure, and expropriation. After completing a Bachelor of Arts degree at York University in June 1992, Charlotte became one of the youngest members of the first-year law school class at the University of Victoria Law School. Charlotte is the current Chair of Hungry Hearts, an annual fundraising event to support Our Place Society.

Financial Advisor: **Alexandra (Ali) Edgell**



Ali's 22 year career in investment management is unique. She is the second generation leader of the Edgell Wealth Advisory Team, a business with over a 40 year history of providing financial advice to discerning individuals and their families. Ali has achieved the senior designation of Fellow of the Canadian Securities Institute (FCSI), the industry's highest mark of distinction. Representing individual integrity, and absolute professionalism, the FCSI designation is reserved for financial professionals who have met stringent standards for advanced education, experience and ethical conduct. Ali is also a licensed portfolio manager for clients requiring discretionary investment management and, a licensed financial planner. Ali is involved in both local and international charitable endeavours. She is the Past President of the Rotary Club of Victoria having led its 100 members into their second century of service above self and, she is a six-time Paul Harris Award recipient from the Rotary International Foundation.

Charitable Sector: **Sara Neely**



Sara joined the Victoria Foundation in 2008. She is responsible for working with professional advisors and their clients, building relationships in the community and enhancing services provided to individuals and organizations who invest their funds with the Foundation. A native Victorian, Sara graduated from the University of Victoria Faculty of Law in 1982. After practicing for several years Sara joined the BC Children's Hospital Foundation in 1993 where she served as the Director of Gift and Estate Planning for over 14 years. Sara maintains membership with the Law Society of British Columbia, the Canadian Bar Association, the Victoria Estate Planning Council, and the Canadian Association of Gift Planners. She was also the founding chair of LEAVE A LEGACY™ British Columbia and served on the Board of the Victoria Symphony for six years.

Philanthropist: **Sybil Verch**



Conceive. Believe. Achieve. Sybil lives by this motto and took charge of her own destiny at a young age. With a deep seeded drive to empower women, Sybil authored *The Female Edge*, a book that inspires women to set new goals for themselves, overcome obstacles and live a life with purpose. Sybil believes everyone should give back to their community and practices what she preaches. She is a dedicated philanthropist with her own charitable giving account. Sybil contributes 5-10% of her income each year to *The Sybil Verch Charitable Fund* and in turn distributes annual grants to various non-profit organizations, with a heavy weighting towards those organizations that empower women and girls. Sybil established the Sybil Verch Woman in Business Award of \$2500 per year to a fourth year female B.Comm student with an interest in a career in finance. Also, Sybil donated over \$100,000 to the YMCA-YWCA of Vancouver Island to open a new childcare centre to further support women returning to work and empower their families. Not only generous with her money, she is also generous with her time. No matter what Sybil Verch undertakes, she does so with great passion, determination, compassion and a sincere desire to make a difference in the lives of others.