



Keith H. Sjögren

Keith Sjögren has recently retired from his role as a Managing Director at Investor Economics, a leading provider of research and advisory services to the financial services industry in Canada. In his role, Keith was responsible for identifying and managing consulting and research engagements with a wide range of financial institutions and businesses.

Prior to joining the consulting profession in 1995, Keith held a number of executive positions at CIBC including Senior Vice President, Private Banking & Trust and President, CIBC Securities. His banking career spanned retail banking, wealth management and international banking. He has lived and worked in the United States, Iran, the United Kingdom, and Singapore.

Educated at Carleton University, Ottawa and the University of Toronto, Keith is a Fellow of the Institute of Canadian Bankers and holds the Partners, Directors, and Officers qualification of the Canadian Securities Institute.

Keith is the Chair of the Advisory Council to the Master of Philanthropy and Nonprofit Leadership at Carleton University, a member and former Chair of the Investment Committee of the Centre for Addiction and Mental Health Foundation and a member of the Executive Committee of the Emeritus Counsel of the Canadian Opera Company. Keith is also a member of the Seniors Expert Advisory Committee of the Ontario Securities Commission.

Keith is the author of a number of major reports on issues such as the transfer of wealth; women and wealth; the HNW client in Canada, as well as reports and papers on the issue of women and philanthropy and donor-advised funds.