

LET'S MEET!

Marg Franklin

By Anne-Marie Munnik RBA



Marg Franklin, CFA, CEO and president of CFA Institute, visited the Netherlands in February 2023 to meet and greet CFA Society Netherlands members and key stakeholders in the industry. She also joined the celebrations which marked the five year anniversary of the CFA Society-VBA merger by sounding the gong at the Amsterdam Stock Exchange.

There were a number of highlights from Marg's visit, including her participation in our roundtable on Diversity, Equity and Inclusion with leaders from the Dutch asset management industry – please check out the report on this in the *VBA Journaal*. We also met with the Authority for the Financial Markets (AFM) to discuss sustainability, digitalization and the use of data, as well as how CFA Institute and CFA Society Netherlands can contribute to the goals of the AFM on these topics. Of notable relevance is the objective of CFA Institute to push investment horizons further out for better alignment with the impact of climate change. Marg received vocal consent on her view that a sustainable investment policy based solely on exclusion is not sufficient, a form of engagement is needed to affect change. In a meeting with the Dutch Securities Institute (DSI), we discussed developments in professional competence and differing regulations on the matter, within a European context. As our strategy on these topics is very much aligned with that of CFA Institute, it was great to hold conversations together. Marg also brought her significant experience in the investment industry, her global view and characteristic energy to the table to drive progress!

With Marg's interest in contributing to improving the opportunities and visibility of women in the investment industry we organized a lunch meeting with our entire Women in Investment Management (WIM) committee. In an informal, lively setting, ideas surfaced around speed-networking

events, making events more accessible for women to attend and specific mentoring schemes, among others (although we maintain focus on inclusion and being open to all member groups).

During the 'Meet and Greet' with members Marg talked about the strategic priorities of CFA Institute, including building a global community and further enhancing member value. She touched upon the recently announced changes to the CFA program which meet the needs of employers and candidates alike. There was as well lively engagement with our committee chairs, members and candidates over drinks.

Marg assumed her current role in September 2019. Before joining CFA Institute, she led International Wealth Management for North America and was president of BNY Mellon Wealth Management, Advisory Services in Canada. Prior to joining BNY Mellon in 2016, Margaret held multiple senior positions in asset management. She began her career in the institutional business and has worked with pension plans, endowments, foundations, and government agencies. She previously served as chair of CFA Institute Board of Governors and is a former president of the CFA Society Toronto Board. She is a founding member of the CFA Institute Women in Investment Initiative, is a CFA charterholder and a member of CFA Society Toronto. Marg is married, has two children in their twenties and lives in Toronto. She is a former competitive road cyclist and still likes to cycle.

