

ICE SUMMIT 2024



Election Candidate Bio

Name

Catherine Wood

Running for the position of

Director-at-Large (2-year term)

Residence

Toronto, Ontario

Relevant Education, Career and Volunteer Experience:

Coming out school, I founded my own consultancy, Chate Communications, specializing in software development and digital marketing. Following Chate, I have held executive and senior management roles at Assante, TD and Qtrade. Prior to my current role, I served as Senior VP, Head Online Brokerage and Digital Wealth + Chief Marketing and Innovation Officer for Aviso Wealth.

In 2019, I joined Coast Capital, which is a federally regulated bank and credit union, as their Chief Strategy, Product and Marketing Officer. Reporting to the CEO, I oversee the company-wide strategy, customer experience, marketing & brand, social purpose mandate, as well as the product portfolio. A few highlights of recent accomplishments that connect to Skate Canada's strategic plan include:

- Oversaw the development of Coast Capital's new brand identity, "We're For Real". Which speaks directly to helping customers get real advice and support, so they can achieve real goals like saving more and getting out of debt. It's important to me that our brand promise supports real people to get real advice to live their real dreams, which I believe ties nicely with Skate Canada's strategic theme of everyone deserves to skate and skating for life.
- Established Coast Capital's social purpose office. Coast's social purpose of "building better futures" drives every decision and prioritizes Coast's support of more equitable access to education, employment, and inclusion. It is proof of a business model where you can do good and do well, and believe Skate Canada has a similar philosophy to create a strategy that seeks to balance long-term stability with greater community impact.
- Reimagined Coast Capital's community investment program placing inequity-experiencing groups firmly at the heart of the approach. In 2023, Coast Capital made a one-million-dollar investment in the Construction Foundation of BC to help skilled trades workers facing educational barriers. I believe this speaks to Skate Canada's recognition that to win, it is an ecosystem that needs to work together to achieve greatness.

One of my biggest undertakings at Coast Capital has been leading the development of our ambitious five-year strategy. Guided by a vision of "unlocking financial opportunities that positively impact people and communities", the strategy is strongly aligned with my conviction that sound, human-centred and financial advice should be accessible to every person. As Skate Canada looks to conclude its current strategic plan in 2026, my abilities in support of strategy could be valuable to the Board. Outside of work, I have volunteered on various Boards and Committees, most recently was Chair of Advocis, Financial Advisors

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Association of Canada and Governance Chair, Holland Bloorview Rehabilitation Hospital. Both of my terms completed in 2023 and recently joined the Healthcare Insurance Reciprocal of Canada, Risk Committee.

From an education perspective, I hold my Master of Business Administration (MBA) and Masters of Information Studies, Computer Systems (MISt.) from the University of Toronto and multiple financial designations including Certified Financial Planner (CFP), Tax and Estate Planner (TEP) and Chartered Life Underwriter (CLU). I also hold my Director's designation (ICD.D) from the Institute of Corporate Directors.

Experience Relevant to the Skate Canada Board of Directors

While serving on the Holland Bloorview (HB) Rehabilitation Hospital's Board and held the Governance Chair role, we enhanced Board diversity by evolving the selection process and brought on new members that were historically under-represented. HB cares for children with disabilities, and we needed to see parents and those with disabilities represented on our Board. Partly inspired by my role on the Board, Coast Capital participated in Toy Hackathons, which enabled toys to be adapted for use by children with varying abilities. Coast's corporate fundraising team also supports Capes for Kids. It is important to me to integrate the work being done at the Board level with other aspects of our lives to leverage the collective impact.

After two decades of volunteerism, I was appointed the Chair of the Board for Advocis, Financial Advisors Association of Canada. Advocis is the largest voluntary professional membership association of financial advisors representing more than 17,000 member-clients and 40 Chapters. In this role, I spoke to people across the country about how to build a more inclusive financial industry - one that invests in mentorship and reimagines how advisors can stay relevant to their clients. I worked to reduce industry complexity and bring about higher professional standards to financial advisors to protect everyday Canadians. During my tenure, I elevated Board governance to better delineated the role of the Board and management, instituted financial and risk-management practices, and formalized workplans and committee structures to improve effectiveness.

My history of giving back to community extends to volunteer and leadership roles for various organizations including as Chair of Membership & Nominations for the International Women's Forum Board, Audit Chair for the Financial Planning Standards Council (now FP Canada) and the Chair of Education & Chair of Marketing for Institute of Advance Financial Education. Given Skate's Canada focus on safety, my time on the Quality Committee of HB would be relevant as well as my Investment Committee experience as it relates to prudent asset management.

My work experience has given me the privilege to lead national businesses, multiple teams in various capacities/disciplines and work directly with Boards, as a member of the Executive team, which can be valuable to the Skate Canada Board. My experience ties closely with the foundational enablers that Skate Canada is focused on, such as:

- Depth in financial, risk and asset management in my capacity as business leader supporting pillar 1 and 2.

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- Led brand and marketing, learning + development and digital functions supporting pillar 3 and 4.
- Leverage technology, data, distribution channels and customer experience to create omni-channel delivery systems supporting pillar 4.

On a personal note, I was a figure skater myself and went back in my 30's to do my Diamond dances. I do know what was involved to excel as a skater, the critical role of coaches and the eco-system that is required to enable someone to win. It has been a passion for many decades and would love the opportunity to giveback to the sport that gave me so much.

Areas of Interest Within Skate Canada:

I am particularly interested in helping Skate Canada achieving its goal to include even more people from diverse backgrounds, abilities, and situations to this wonderful sport. As a past skater, I would appreciate the opportunity to see the creation of those pathways and programs to improve participation over time. Finally, I want to be an advocate / supporter for those that want to pursue skating to garner access to the funding, resources, and expertise they need to be successful on the world stage, if so desired.

I would also like to lend my support in the evolution of the Skate Canada brand development, its new strategic plan (dependent on timing), its fiscal and enterprise risk management evolution and its delivery capacity objectives around digital transformation, user experience and education and tools.

Given the above, a few committees of interest are the Finance + Enterprise Risk Management, External Relations, Governance and CEO Operational Review.