



**FINANCIAL SERVICES – A CAREER SEARCH**  
**Presented by CIBC Bank**  
**SummerUp 2022**  
**Course Description**

**Course Name:** Financial Services – A Career Search

**Who Should Apply:** You are a Black youth, Ontario resident, and you are keen to explore career opportunities in business and finance. As well, you fit into one of the following two categories:

- You will be enrolled in Grade 12 in September 2022.
- You will be enrolled in post-secondary studies in September 2022.

**Visit the SummerUp Website:** <https://lileaders.com/summerup/>

### **What**

Rarely do we encounter Black youth declaring a desire to pursue a career in the financial services sector. While there are many causes for this, we are targeting this SummerUp course at the lack of exposure to the varied employment opportunities found in the financial services sector. These positions are generally well paying and may be found in a set of industries such as banking, insurance, investment dealers and mutual fund companies. Invariably, these positions integrate a number of important skills ranging from business finance, critical thinking and analysis, problem solving, collaboration, data analysis, and competence in digital technology. Having more diverse representation is desirable for this industry and for the customers serviced by this industry.

This SummerUp course is designed to get more Black youth thinking about careers in finance as well as discovering their own unique capabilities. This course is premised on the strong belief that, if Black youth with the aptitude for business and an interest in working with people are encouraged to look more closely at financial-services careers, they may be inspired to pursue these careers. This is to say these students may take the career-planning steps to actively enter the financial services industry. What are the various employment opportunities? What are the qualifications for entry? What are the key skills associated with financial services? What is the work environment like? Do your talents and strengths align well with the requirements of this industry? Are special professional credentials required? What is the recommended post-secondary pathway?

*Financial Services – A Career Search* is a ‘starter kit’ for the student who is open to discovering the various careers in financial services. The course provides five highly focused sessions:

- four sessions will be presented virtually, and each will have a senior representative of the CIBC bank present the career opportunities in particular areas of the world of banking and finance, and
- the fifth session will be an in-person visit to the new CIBC Square in downtown Toronto to observe the work environment (e.g. the trading floor), to talk with financial-services practitioners, and to network with key bank personnel. All meetings are designed to be ‘student friendly’ – each presenter is committed to supporting students’ career exploration and to dialoguing with students.

### **Why this Matters**

For all participating students, this is an important research step in your career exploration. If you are entering Grade 12 this September this course will guide your thinking regarding post-secondary options. If you are just completing Grade 12 and are entering post-secondary studies in September, this course will enable you to build a career pathway to the [financial services industry](#)...and there are multiple pathways. If you are already enrolled in post-secondary studies and need to pivot to financial-services opportunities, this course constitutes career discovery.

Here are the themes for each session of this course:

**Day 1:** Monday, July 18 – 4:30-6:00pm: Career opportunities in *Retail Banking* – a CIBC perspective.

Presenter: **Akil Bishop** - Senior Vice-President, Regional Head Banking Centre, CIBC

**Day 2:** Tuesday, July 19 – 4:30-6:00pm: Career opportunities in *Wealth Management*.

Presenter: **Andrew McDonald** - Senior Wealth Advisor, CIBC Wood Gundy

**Day 3:** Wednesday, July 20<sup>th</sup> – 4:30-6:00pm: Career opportunities in *Commercial Banking*.

Presenter: **Jomo Russell** - Vice-President, Procurement, CIBC

**Day 4:** Thursday, July 21<sup>st</sup> – 4:30-6:00pm: Career opportunities in *Capital Markets*.

Presenter: **Osahon Omokhodion** - Managing Director, Global Markets, CIBC

**Day 5:** Monday, July 25<sup>th</sup> - 11.00 a.m. to 2.00 p.m. *The Inside Edge – A Visit to CIBC Offices*. This is an opportunity to get inside the offices and special work areas of the CIBC bank – meet bank staff, witness bank professionals at work, share in discussions over a light lunch.

Host: **Harry Ezenibe**, Senior Consultant; Inclusion; People Culture & Brand, CIBC

### Admission Details

**Who: Who Should Apply:** You are a Black youth, Ontario resident, and you are keen to explore career opportunities in business and finance. As well, you fit into one of the following two categories:

- You will be enrolled in Grade 12 in September 2022.
- You will be enrolled in post-secondary studies in September 2022.

Additionally, you have a suitable computer and reliable access to the Internet. You are willing to commit to attending all scheduled learning sessions (see dates and times below).

**Admissions Process:** All eligible applicants will be considered for admission. Refer to application deadlines at <https://llileaders.com/summerup/> Applicants will be required to attend a course orientation.

**Start/Stop Dates:** SummerUp *Financial Services – A Career Search* will span two weeks starting on Monday, July 18 and ending on Monday, July 25. Online classes will be 90-minutes duration starting at 4.30 p.m. and ending at 6.00 p.m.

**Meeting Pattern:** Applicants must commit to attending the following learning sessions:

#### Week 1:

Monday, July 18 – 4.30 p.m. to 6.00 p.m. (Virtual Mode)

Tuesday, July 19 – 4.30 p.m. to 6.00 p.m. (Virtual Mode),

Wednesday, July 20 – 4.30 p.m. to 6.00 p.m. (Virtual Mode)

Thursday, 21 – 4.30 p.m. to 6.00 p.m. (Virtual Mode)

#### Week 2:

Monday, July 25 – 11.00 a.m. to 2.00 p.m. (In-person Mode. Dress code applies.)

**Mode:** Hybrid (i.e. a combination of virtual and in-person sessions). Students must have a laptop computer and reliable internet access.

### Course Faculty

#### Andrew McDonald, Senior Wealth Advisor, CIBC Wood Gundy

[Andrew McDonald](#) is lead portfolio manager and head of The McDonald Group at CIBC Wood Gundy. He joined the firm in 1996 as a sales assistant at Midland Walwyn, a predecessor firm. Andrew's work ethic and perseverance was encouraged by Joyce Eisen, a Vice President and Senior Advisor at the time (she retired in 2010). Joyce took Andrew under her tutelage to provide great career and personal mentorship.

Andrew specializes in creating personalized and holistic wealth strategies for private and institutional clients. Andrew is committed to building positive and impactful relationships, and advocates for a team approach to ensure every client need is addressed. A strength of Andrew's team is its ability to design innovative investment portfolios that capture returns offered in today's markets, while staying positioned to capitalize on future opportunities. Andrew wants his clients to feel like they can come to him with anything. His team can apply their expertise, and the strength of CIBC, to solve the financial challenges they face. Andrew is there not just to manage wealth strategies, but to listen to his clients and care for their best interests.



As needed, Andrew and his team partner with experts in other areas of CIBC Private Wealth; including financial planning specialists, tax strategists, estate planning and trust specialists, and private bankers. This enables the team to address every dimension of their clients' wealth strategies. By integrating multiple financial services under their scope, they are able to provide clients with more synergistic and complete wealth solutions.

Andrew has an Honours BA from the University of Toronto, the Chartered Investment Manager (CIM) designation, and derivatives and estate planning accreditations. Over the last year, Andrew has spoken to students at the TDSB virtual school, and to MBA students at the Schulich School of Business and Rotman School of Management about the challenges and opportunities of wealth management. Andrew is especially proud of his efforts for the CIBC Miracle Day fund raiser for children. Through this platform, Andrew's contribution and support has resulted in a meaningful impact on various children's charities.

### **Jomo Russell, Vice-President, Procurement, CIBC**

[Jomo Russell](#) has over 14 years of Commercial lending experience primarily focused on acquisition and other event driven financings.

His experience includes both enterprise value-based lending on a senior and subordinated debt basis as well as asset based lending for various private equity sponsored LBOs, MBOs, acquisitions and general recapitalizations leading both bilateral and syndicated structures. His diverse sector experience includes transactions in the business services, manufacturing, retail, transportation, energy, distribution, construction, healthcare and food industries.



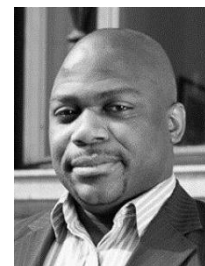
Jomo has led high-performing teams that have consistently exceeded business targets and managed a growing credit portfolio in compliance with CIBC's risk parameters and policies by focusing on coaching and mentoring, formal technical training and granting increasing levels of transaction exposure to team members. He has managed CIBC's most important private equity sponsorship relationships, driving incremental business opportunities and cross-selling wins, led numerous syndication efforts representing CIBC with other lenders and worked with portfolio companies through periods of temporary underperformance resulting in deeper long-term relationships for CIBC.

Jomo currently leads CIBC's Procurement group where he is responsible for leading end-to-end procurement for CIBC, including all programs related to planning, supplier selection, negotiating, contracting, and purchasing across the enterprise.

Jomo has an MBA from the Schulich School of Business and is a CFA Charter holder.

### **Osahon (Ossie) Omokhodion – Managing Director, Global Markets, CIBC**

[Ossie Omokhodion](#) has over 18 years experience in developing and executing customized derivative solutions for institutional, corporate & retail clients within the Foreign Exchange, Interest Rate, Commodity & Equity spaces. He also develops systematic strategies across all asset classes aforementioned. Ossie joined CIBC in 2011. The



Structuring group's mandate, which Ossie manages, is to better understand clients' needs and customize suitable solutions to manage various exposures.

Prior to joining CIBC, Ossie held positions in Foreign Exchange, Interest Rates & Commodities at Bank of America Merrill Lynch and Goldman Sachs in Europe. Ossie holds a Masters in Engineering degree from the University College London, University of London.

### **Akil Bishop, Senior Vice-President, Regional Head Banking Centre, CIBC**

Akil provides leadership in the development and delivery of an integrated regional strategy to maintain an exceptional client-focused sales and service culture, and effective partnership to provide "best in class" service and overall experience to CIBC's clients across 240 banking centres in Ontario West region.



Akil has held senior leadership roles at CIBC for the past 8 years, driving business enablement in roles spanning assurance, controls optimization, data analytics, and national sales strategy and execution. Akil is actively involved in building and sustaining inclusive leadership at CIBC as a member of CIBC's Inclusion & Diversity Leadership Council, and Co-Executive Sponsor of the CIBC Black Employee Network, one of 10 People Networks at CIBC. Akil also serves on the Advisory Board of the Canadian Association of Urban Financial Planners Professionals and serves in the community as a board member of Agincourt Community Services Association.

### **Harry Ezenibe, Senior Consultant, Inclusion, CIBC**

[Harry Ezenibe](#) recently joined CIBC in 2021 where he supports the Workforce Experience and Employee Relations Team. He holds a BA from Saint Mary's University, and has completed post-graduate work in Organizational Design, Human Resources Management and Leadership.



Before joining CIBC, Harry worked with Toronto Raptors Front Office in the Player Development department and with Vish Software as a Head of People and Culture. Harry's diverse and multifaced experience from the sports, technology, non-profit and currently, the financial industry have been very instrumental to his success as a professional.

Harry currently leads the Inclusion Partnership portfolio of CIBC's Inclusive Banking strategy where he manages CIBC's signature partnerships focused on making strategic investments in the next generation of leaders and changemakers from communities traditionally underserved.

Outside of work, Harry also has over 13 years of experience in the non-profit and community outreach space, and he is the President of [HarryCares](#), a non-profit he helped create, focused on youth empowerment and community development.

### **Special Note:**

**SummerUp** is a program designed to serve and support the personal and professional aspirations of Ontario's Black youth. The program is developed and presented by the **Lifelong Leadership Institute** (LLI) in collaboration with the [CIBC bank](#). While SummerUp is primarily funded by the Ontario Ministry of Education, the *Financial Services – A Career Search* course is funded and delivered by the CIBC bank. The quality of the SummerUp experience is assured by the contributions of a diverse group of individuals, educators, institutions, and corporations. All are committed to championing the well-being, development and advancement of Black youth.

The Lifelong Leadership Institute also offers the **Leadership by Design** program which provides extensive leadership-development opportunities to Black youth.

This **SummerUp** 2022 program is sponsored by CIBC bank.

