

Panellists' biographies

Session moderator



Richard Olfert

Managing Partner, Regulatory, Quality and Risk
Deloitte Canada

Richard is Deloitte's Managing Partner of Regulatory, Quality and Risk. He is also a member of Deloitte Canada's Executive leadership, a member of Deloitte Global's risk and regulatory committees, and a director of Nautilus Indemnity Limited, Deloitte Touche Tohmatsu Limited (DTTL)'s global captive insurer. From 2013 to 2016, Richard was the Managing Partner for Audit in the Canadian firm. He continues to serve on the Global Audit Leadership Team, participating in the global project to transform Deloitte's audit systems, tools and offerings. Richard has twice been elected to Deloitte Canada's board of directors, serving as chair of its finance committee both terms. He also served as the Managing Partner for the Winnipeg Office from 2002 to 2008.

Presenters



James Davis

Chief Investment Officer
OPTrust

James C. Davis is the chief investment officer of OPTrust, one of Canada's largest pension funds with net assets over \$20 billion. He joined OPTrust in 2015 to lead the organization's investment strategy and oversees its diversified portfolio, which holds public market, private market, infrastructure, and real estate assets in North America, Europe, Asia, and emerging markets.

James has over 25 years of experience in strategic investment planning and leadership, delivering proven results in liability-driven investing and portfolio design. Before joining OPTrust, he held the role of vice president, strategy and asset mix, and chief economist at the Ontario Teachers' Pension Plan. Previous positions included president of FuturesTrend Capital Corporation in Prince Edward Island and vice president and head, Global Fixed Income & Currencies, at RBC.

A CFA charter holder, James is recognized as an engaging speaker in a broad range of forums in the pension industry, and is known for his insights on global economics, portfolio construction, and investment strategy. In addition to a degree in mathematics and a diploma in meteorology, he has an MBA in finance from Dalhousie University.



Brian Lawson

Senior Managing Partner and the Chief Financial Officer
Brookfield Asset Management

Brian Lawson is a senior managing partner and the CFO of Brookfield Asset Management. He's responsible for Brookfield's global finance, treasury, and risk management activities. He also sits on a number of the organization's investment committees, and is a member of its board of directors. Brian has held a number of senior management positions in investment and finance operations since joining Brookfield in 1988, and assumed his current role in 2002.

Brian was named Canada's CFO of the Year in 2013 by PwC, FEI Canada, and Robert Half International. He is co-chair of the Canadian Chapter of Accounting for Sustainability's (A4S) CFO council.

He and his wife, Joannah, are involved in several philanthropic efforts focused on reducing chronic disease through improved nutrition. They are founding sponsors of the Lawson Centre for Child Nutrition and Health at the University of Toronto and support Community Food Centres Canada, of which Brian is a director. He is also a member of the governing council of the University of Toronto.



Eileen Mercier

Chair, Payments Canada

Eileen Mercier, who has been the chair of Payments Canada's board of directors since July 2015, has played a crucial role in transitioning the organization's governance model. Once a member-controlled organization, Payments Canada now includes seven independent directors and five financial institution directors.

Her career encompasses over 40 years of general management experience in the financial services, communications, integrated oil, and paper and forest products sectors. From 1995 to 2003, she headed her own management-consulting firm. Prior to that time, she was senior vice president and CFO of Abitibi-Price Inc. A professional director, Eileen currently serves on the boards of Intact Financial Corporation and the Royal Conservatory of Music, and is a former director on the boards of Teekay Shipping Corporation and the University Health Network. She chaired the Ontario Teachers' Pension Plan Board from 2007 to 2014.

Eileen was named one of Canada's Top 25 Women of Influence in 2011, and in 2012, 2015, and 2017, she was named one of Canada's Top 100 Most Powerful Women. She also holds a pair of honorary LLDs: one from York University, bestowed in 2010, and one from Wilfrid Laurier University, in 2013. She became the chancellor of Wilfrid Laurier in 2016. A Fellow of the Institute of Corporate Directors of Canada, Eileen holds an MBA from York University and a master's degree from the University of Alberta.



Barry Salzberg

Audit Committee Chair
Thomson Reuters

Barry Salzberg currently serves as the chair of the audit committee of the Thomson Reuters board of directors.

He capped an almost 40-year career at Deloitte as Global Chief Executive Officer of Deloitte, a position he held from 2011 until his retirement in May 2015. Prior roles included as CEO and Managing Partner of the firm's US operations. Barry has also served as a board member of New Profit, Inc., chair of College Summit, chair of the United Way Worldwide, and chair emeritus of the YMCA of Greater New York.

Barry earned a BS in accounting from Brooklyn College, a JD from Brooklyn Law School, and an LLM in taxation from the New York University School of Law. He recently went back to school: he's currently a professor at Columbia Business School.