

Calgary Economic Development

**Financial Sector Advisory Committee**



**GEORGE GOSBEE**

Mr. Gosbee founded Tristone Capital Inc. in September, 2000. He founded Tristone on the belief and conviction that investment banking firms working within the energy industry must know as much about oil and gas as their clients. He realized that the only way to deliver that confidence was to create a firm that was both global and technical. Tristone was acquired by Macquarie Capital in August 2009, and Mr. Gosbee is currently the President & CEO of G Capital Inc.

President & CEO, G Capital Inc. (Committee Co-Chair)



**BRUCE GRAHAM**

Bruce Graham has been President and CEO of Calgary Economic Development since 2003, when he turned his focus to the improvement of Calgary's economic and social landscape. He was the catalyst for a new business plan, new Board, and a new approach. Originally from Ontario, the Calgary spirit was evident in Bruce from the very beginning.

President & CEO, Calgary Economic Development (Committee Co-Chair)



**CHRIS ANDERSON**

Chris joined Bissett Investment Management in October 2005 as Chief Operating Officer. In his role Chris coordinates all non-investment related activities for Bissett including legal, finance, compliance, systems, human resources, and premises. Chris graduated from the Wilfrid Laurier University in 1996 with a Bachelor of Business Administration. He received his CA designation in 1998 and his Chartered Financial Analyst designation in 2001. He has completed the CICA In-depth Tax Course and has served as a member of the Investment Funds Institute of Canada's Tax Steering Committee.

Vice President & Chief Operating Officer, Bisset Investment Management



**ROBERT COOK**

Mr. Cook is employed with ARC Financial Corp. in the position of Senior Vice-President. ARC Financial Corp. is a private energy-focused investment management company. Mr. Cook has over 20 years experience in the upstream oil and gas industry including Canadian and international assignments with Shell International Exploration and Production Company. Mr. Cook is a registered Professional Engineer (Alberta), holds an MBA degree and is a CFA Charterholder. Mr. Cook is currently a director and Past President of the Calgary CFA Society.

Senior Vice President, ARC Financial Corp.



**JIM DAVIDSON**

As FirstEnergy Capital Corp.'s co-founder and Managing Director & Chairman, Jim leads the day-to-day operations of a team of investment banking professionals focused exclusively on sectors of the Canadian energy industry. Under Jim's stewardship, the FirstEnergy team continually ranks among the top energy-equity-block traders in Canada. In 2008, Jim was nominated for Canada's outstanding CEO of the Year award. Also in 2008 Jim was invited to join the Canadian Council of Chief Executives.

Chairman & CEO, FirstEnergy Capital

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Leo joined the Alberta Investment Management Corporation as CEO in August 2008. Prior to that, he was CIO at Victorian Funds Management Corporation, in Melbourne Australia. Leo started his 35 year career at the Bank of Canada in Ottawa in 1975. For nearly ten years he served as a senior vice-president at the Ontario Teachers' Pension Plan, with responsibility for long-term investment strategy, risk management, and real return assets.

**LEO DE BEVER**

CEO, AIMCo



Biography not available

**PERRY ENLOT**

Vice President, Energy Financing, HSBC



Shane Fildes was appointed Group Head, Energy, for BMO Capital Markets in May 2009. In this role, he has responsibility for all of the firm's corporate and government relationships in the energy sector, worldwide. Shane also oversees the BMO Capital Markets office in Calgary, where he is based. Shane joined BMO Capital Markets in 1993. He has extensive experience in public/private debt and equity underwritings and has worked on numerous financial advisory assignments involving mergers, acquisitions, divestitures and restructurings.

**SHANE FILDES**

Executive Managing Director, Head of Canadian Energy, BMO Capital Markets



Alexander Fritsche was appointed Senior Representative (Economics) at the Bank's Regional Office for the Prairie Provinces, Nunavut, and the Northwest Territories in June 2009. In this capacity, he directs research and analysis on economic and sectoral developments in the region, including overseeing the Bank's Business Outlook Survey in the region. He also plays a major role in the Office's activities in communicating the Bank's messages to a variety of external audiences and promoting an exchange of views on the economy and monetary policy.

**ALEXANDER FRITSCHÉ**

Senior Economist, Bank of Canada



As Calgary's longest serving energy analyst, Wilf Gobert was appointed to the position of Calgary Economic Development Board Chair by Mayor Bronconnier in November 2008. Gobert brings a wealth of experience and leadership to the city's economic development agency, including 35 years as an energy analyst, mostly in Calgary. Prior to his retirement as vice-chairman of Peters & Co. Limited in May 2006, Gobert worked as a financial analyst at Wood Gundy (now CIBC World Markets) in Toronto and Mutual Life of Canada (now Sun Life) in Kitchener-Waterloo.

**WILF GOBERT**

Chairman of the Board of Directors, Calgary Economic Development

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Michael Halliwell currently serves as the Senior Vice President & Regional General Manager, Prairies for Canadian Western Bank. He specializes in retail and commercial (Real Estate, Energy and Corporate Lending) banking and previously served as Senior AVP & Branch Manager at Canadian Western Bank. Mr. Halliwell is a Director with the Rotary Club of Calgary and serves on Calgary Economic Development's Business Advisory Committee.

**MICHAEL HALLIWELL** Senior Vice President & Regional General Manager, Prairies, Canadian Western Bank



John joined Calgary Economic Development (CED) in 2007, as the Vice President, Investment & Trade Development. John leads CED's efforts to help Calgary companies expand their markets around the world. In addition, he guides CED staff to assist the Calgary region in attracting new business activity from other parts of the continent and the international community. Prior to joining CED, John was the Director, Business Development at Flextronics, an international manufacturing firm.

**JOHN HANKINS** Vice President, Investment & Trade Development, Calgary Economic Development



Tim Kitchen is Managing Director and Head of Investment Banking in Canada for Barclays Capital. In this role, Mr. Kitchen oversees the firm's Calgary and Toronto investment banking teams. Prior to joining Barclays Capital, Mr. Kitchen was Head of Lehman Brothers' Calgary Investment Banking office and coordinated the firm's coverage of Canadian Energy and Natural Resources clients. Mr. Kitchen was also previously a Managing Director at CIBC World Markets where he specialized in energy investment banking from 1990 until 2007, when he joined Lehman Brothers.

**TIM KITCHEN** Managing Director, Head of Canadian Investment Banking, Barclays Capital



Paul Kelly is the President and Chief Executive Officer of First Calgary Savings, the second largest credit union in Alberta, with over \$2.5 billion in assets under administration, over 100,000 member-owners and almost 500 employees. First Calgary Savings is recognized as a Platinum Club member of Canada's 50 Best Managed Companies program and one of Alberta's Top Employers. He has more than 30 years of experience in the Canadian financial services industry and is an active leader within the Alberta Credit Union system.

**PAUL KELLY** President & CEO, First Calgary Savings

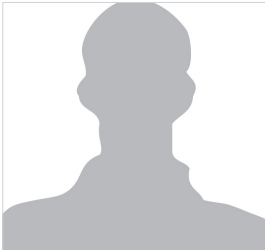


Art Korpach is the Vice Chairman, Head of Global Oil & Gas (Calgary) for CIBC World Markets. He joined CIBC World Markets in 1985 and has had assignments in both Toronto and Calgary. Mr. Korpach has extensive M&A, financial and advisory experience, including valuation assignments for clients in the energy sector. He is a Fellow Chartered Accountant, Chartered Business Valuator, Past Chair of CICA Accounting Standards Board, and holds an M.B.A. from Harvard Business School.

**ART KORPACH** Vice Chairman, Head, Global Oil & Gas, CIBC World Markets

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Drew is Vice Chairman and Head of the Global Energy & Power Group at TD Securities and Co-Head of TD Energy Trading. In his career, he has lead managed over \$10 billion in energy equity financings and advised on over \$80 billion of energy M&A transactions, including 5 of the 10 largest global energy M & A transactions in 2007. Prior to joining TD Securities, Drew was Head of Energy for BMO Capital Markets. He has also practiced securities law in New York, Toronto and Calgary.

**DREW MACINTYRE**

Vice Chairman, Head, Global Energy and Power Group, TD Securities



George Marlatte was appointed Senior Vice-President of The Bank of Nova Scotia, Prairie Region, effective September 1st, 1999. Mr. Marlatte has also held senior positions with the Bank in Toronto, Vancouver and Europe. Mr. Marlatte spent his formative years in Saskatoon, Saskatchewan and joined Scotiabank, Saskatoon Branch in January 1968. While working for the Bank, he completed his Bachelor of Commerce at the University of Saskatchewan in 1973. He is also a Fellow of the Institute of Canadian Bankers.

**GEORGE MARLATTE**

Senior Vice President, Prairie Region, ScotiaBank



Michael Mezei is a Director and President at Mawer Investment Management Ltd., which he joined in July 2008. He is responsible for leading the growth and management of the business. Mr. Mezei chairs the Firm's Management Committee which is responsible for the development and execution of the Firm's strategic plan. Mr. Mezei earned a Bachelor of Arts degree from the University of Toronto and an LLB from Osgoode Hall Law School, along with various investment industry designations.

**MICHAEL MEZEI**

President, Mawer Investment Management Ltd.



Over three decades, the Alberta-born, B.C.-educated Mowat has seen all aspects of the banking world: venture capital markets, credit, retail and small business financing, and three chief executive posts. His passion for the industry has led him to the boards of several prominent Canadian organizations, including Visa Canada and the Citizens Bank of Canada. He was hired in June 2007 as President and CEO of ATB Financial, the largest Alberta-based financial institution.

**DAVE MOWAT**

President & CEO, ATB Financial



Chris Potter has been in the investment banking business with Peters & Co. Limited since 1994. Mr. Potter is currently a member of the Board of Directors of the Alberta Children's Hospital Foundation and a 2007 recipient of Canada's Top 40 Under 40. Mr. Potter holds a B. Comm from the University of Calgary and received his Chartered Financial Analyst designation in 1999.

**CHRIS POTTER**

President, Peters & Co.

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Bill Rice was appointed Chair and CEO of the Alberta Securities Commission in July 2005. At the time of his appointment, he had over 25 years of experience as a securities lawyer and had most recently concluded a 32-year career with the Bennett Jones LLP law firm as its national managing partner. Mr. Rice has had board and chair responsibilities with several public and private companies over the course of some 15 years and has lectured on the subjects of securities regulation, corporate law, public financing, mergers and acquisitions, corporate governance and law firm management.

**BILL RICE**

Chair & CEO, Alberta Securities Commission



Gordon Ritchie has been with RBC Capital Markets for 30 years, and currently holds the position of Vice Chairman. From 2001 through 2005, Gordon served as Managing Director and Head of the Global E&P Energy Group. Previously, Gordon spent six years in New York where he served as President and Chief Executive Officer of RBC's U.S. Broker/Dealer Operations (1993 to 1999), where he was responsible for development and execution of the RBC Capital Markets U.S. business strategy.

**GORDON RITCHIE**

Vice Chairman, RBC Capital Markets



Bob Thompson is President and CEO of Brownstone Asset Management, a Calgary based investment management firm he founded in 2003. Prior to forming Brownstone, Bob spent eight years with Bissett & Associates Investment Management Ltd. where he was a Vice President and Portfolio Manager. He managed a wide range of portfolios with varied investment mandates including pure equity, balanced and fixed income strategies. Bob has previously held senior roles in project development and investor relations with a major publicly traded oil and gas corporation.

**BOB THOMPSON**

President & CEO, Brownstone Asset Management



Dr. Leonard Waverman, a world-renowned expert in the international telecommunications and resource management sectors is the Dean of the Haskayne School of Business. Dr. Waverman has extensive experience in academia and the private sector. He comes to the Haskayne School of Business from the London Business School where he was Chair of Economics for four years. Before moving to the London Business School, Dr. Waverman was a professor of economics at the University of Toronto.

**LEONARD WAVERMAN**

Dean, Haskayne School of Business, University of Calgary



As the Business Development Manager - Financial Services, Rachel's focus is to attract new business within the financial services sector, and facilitate business expansion. In her career, Rachel has built her expertise in multicultural business settings. With a degree from Guangdong University of Foreign Studies, Rachel assisted the operation and expansion of HP Services in Southern China. Upon immigrating to Canada, Rachel completed her MBA in Finance from the University of Calgary, and was appointed Controller of an Alberta-based construction company.

**RACHEL YIN**

Business Development Manager, Calgary Economic Development