

## **JIM MCGEER CPA, CA, CFA**

### **CFO in Residence**



#### **CONTACT INFORMATION:**

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Jim is a Senior Finance and Accounting Executive who is backed by more than 30 years of diverse financial management experience. His core expertise includes financial reporting, planning and analysis, strategy development, risk management and performance measurement. Jim's strong analytical, diagnostic and problem-solving skills are further complimented by his collaborative approach, ensuring effective and meaningful dialogue with all levels of stakeholders within an organization.

Jim began his career with various progressive roles in leading financial organizations that included Royal Bank, CIBC and Ernst & Young. These positions laid the foundation for his advancement into senior level leadership positions that began in 2002 as Vice-President and Controller, Investments Division with Manulife Financial Corporation. Recognized for his highly regarded insight and analysis into accounting, business and operational matters, Jim then went on to provide leadership to a variety of operations that included Thompson Terminals (privately held asset-based truckload freight transportation and logistics provider), Landsbanki Canada (Schedule III bank based in Halifax), Maple Leaf Foods Inc., Fairfax Financial Holdings and CST Consultants Inc. In 2011 he was recruited by Zag Bank (formerly West Bank), where he acted as Vice-President, Finance and Vice-President and Chief Risk Officer. In 2016 he joined Mountain View Credit Union (now Mountain View Financial Division of Connect First Credit Union) as Vice-President, Finance where he directed financial, regulatory and board reporting, treasury, asset/liability and capital management, business planning and enterprise risk management.

Jim completed his Bachelor of Commerce from the University of Toronto and went on to receive his CA designation from the Institute of Chartered Accounts of Ontario and Chartered Financial Analyst from the CFA Institute. He has since supplemented his education with involvement in numerous professional development programs throughout North America that include National Conference for Canada's Credit Unions, National Credit Union Treasury and finance Forum, Financial Executives International (FEI) Canada Annual Conference, Marcus Evans 8th Annual Liquidity Conference, Fortune Leadership Summit (Gazelles) and Federated Press 9th Annual M&A Valuation for CFOs Conference to name a few.