




# IAN PICARD

DEPUTY MANAGER OF DEVELOPMENT AND  
ASSET MANAGEMENT  
@ RBA FINANCIAL GROUP

 LANGUAGES SPOKEN  
FRENCH  
ENGLISH

## PROFILE

I LOVE A CHALLENGE AND HAVING A REAL IMPACT ON PEOPLE'S QUALITY OF LIFE. THE RETIREMENT AND INSURANCE FIELDS ARE QUITE VARIED AND PROVIDE OPPORTUNITIES FOR ME TO GROW PERSONALLY AND PROFESSIONALLY.

## EDUCATION

**EXECUTIVE MASTER'S IN BUSINESS  
ADMINISTRATION**  
MCGILL UNIVERSITY - HEC MONTRÉAL

**BACHELOR'S IN BUSINESS ADMINISTRATION -  
MAJOR IN FINANCE**  
UNIVERSITÉ LAVAL

**CERTIFICATE IN INSURANCE AND GROUP  
ANNUITIES**  
UNIVERSITÉ LAVAL

**CERTIFICATE IN FINANCIAL SERVICES**  
UNIVERSITÉ LAVAL

**MANAGEMENT TECHNOLOGY - FINANCE OPTION**  
CÉGEP FRANÇOIS XAVIER GARNEAU

## MY TASKS

- **CLIENT RELATIONS MANAGEMENT -  
INSURANCE AND GROUP ANNUITIES**  
-THIS ASPECT OF MY WORK IS VERY INTERESTING BECAUSE IT LETS ME SPEAK WITH OUR CLIENTS ON A REGULAR BASIS. ALTHOUGH I NOW HAVE A TEAM TO HELP ME WITH CLIENT RELATIONS MANAGEMENT, IT'S ALWAYS STIMULATING TO FIND SOLUTIONS BASED ON THE NEEDS OF OUR INDIVIDUAL CLIENTS.
- **ASSET MANAGEMENT**  
WE MANAGE A LITTLE OVER \$1 BILLION THROUGH OUR VARIOUS RETIREMENT PLANS. MY ROLE IS TO TAKE PART IN THE INVESTMENT COMMITTEE'S DECISIONS ON INVESTMENT POLICY AND TO APPLY THAT POLICY. I ALSO RUN THE OPERATIONAL ASPECT OF ASSET MANAGEMENT HAVING TO DO WITH REBALANCING ASSET CLASSES AND CASH FLOW MANAGEMENT.

## WHAT I

- MY JOB IS EXTREMELY VARIED. EVERY DAY IS DIFFERENT!
- WHETHER I'M TALKING WITH CLIENTS, MEMBERS OF MY TEAM, EXTERNAL PARTNERS, OR ADMINISTRATORS, EVERY DISCUSSION IS RICH AND REQUIRES A HIGH DEGREE OF FOCUS AND EXPERTISE.

## WHAT I

- BECAUSE OF THE DIVERSITY OF OUR MANDATES, FREE TIME IS HARD TO COME BY. NEVERTHELESS, IT'S STIMULATING, AND IT MAKES THE DAYS, WEEKS, AND MONTHS RACE BY!