



Banking in the Future: Navigating Fairness, Accessibility, and Equity

Speaker Profiles:



Dr. Candice Chow, C.Dir., Assistant Professor | DeGroote School of Business

Candice Chow is the Program Director of The Foresight Lab and an Assistant Professor of Strategic Management at DeGroote School of Business. Prior to becoming a full-time academic, Candice held various senior management positions cross-continent for over twenty-five years. Candice earned her DBA at the Henley Business School, UK and received an MBA at the Ivey School of Business. A graduate of the Directors' College, she holds the Chartered Financial Analyst designation and a Bachelor in Mechanical Engineering at the Imperial College, UK.



Doug Conick, CEO | DUCA

Doug has been President & CEO of DUCA Financial Services Credit Union Ltd. since November 2016. During this time he has been leading the ongoing investment in people, process, technology and in communities, as he and the DUCA team transform the organization into a High-Touch and High-Tech Credit Union able to deliver trusted financial care for the best-interests of all whom DUCA serves. Doug championed and led the development and launch of DUCA's unique charitable foundation - the DUCA Impact Lab in 2018. Doug trained as a CPA and CA. He has championed DUCA's mighty mission and purpose: helping people and businesses Do More, Be More, and Achieve More.



Dr. Jonathan Calof, UNESCO Professor

Jonathan Calof is the UNESCO co-chair on anticipatory systems for innovation and new ventures. A professor at the Telfer School of Management, University of Ottawa, Jonathan is a prolific speaker, author and a world-renowned expert in competitive intelligence and strategic foresight. The media has referred to him as "the éminence grise of Canadian CI theorists." (Globe and Mail Report on Business) and the Jerusalem Post referred to Jonathan as "regarded worldwide as a competitive intelligence guru. Frost and Sullivan presented him with their lifetime achievement award. Jonathan was recently named chair of the Ontario Intelligence Center of Excellence.



Adam Fair, VP Strategy | Prosper Canada

Adam Fair is the Vice President of Strategy and Development at Prosper Canada. Adam began his career in social development at Prosper Canada in 2007. He is responsible for leading strategic planning, and oversees all fundraising efforts. Adam studied politics and economics at the University of Toronto. He also completed the Graduate Diploma in Social Innovation at the University of Waterloo and the Executive Certificate in Nonprofit Management at Harvard University.



Jan A.C. Klakurka, C. Dir., Associate Professor | Huron University

Jan Klakurka is Associate Professor of Management and Organizational Studies at Huron University (Western). Jan's professional designations include: C. Dir., CPA, CA, APF and CMC, the latter where Jan was Gold Medalist for Canada. A graduate of University of Toronto, Ivey Business School, and Director's College (McMaster), Jan's three decades in industry, professional services and academia inform research intersecting strategic planning, lucid foresight, values, higher education and governance.



Tracy Lagasse, Senior Industry Advisor | Microsoft Global FSI

Tracy Lagasse is a Senior Industry Advisor with Microsoft's Global Financial Services Industry team. She works with Microsoft's largest financial services clients, partners and fintechs to accelerate digital transformation with leading edge technology in GenAI, cloud, data, and Open API platforms. With a distinguished 20-year career in Financial Services, Tracy led Innovation in one of Canada's largest fintechs and co-founded a fintech Accelerator. Tracy is a frequent speaker at Women in Technology, Payments and Sales Events along with holding positions on advisory boards for payments modernization and social impact initiatives.



Dr. Addisu Lashitew, Assistant Professor | DeGroote School of Business

Dr. Addisu Lashitew is assistant professor of strategic management at DeGroote School of Business of McMaster University and a Non-Resident Fellow at the Brookings Institution, a Washington DC-based global think tank. He has extensive research experience in the role of financial technologies in advancing financial inclusion around the world. At McMaster, he teaches undergraduate courses in international business and sustainability.



Dr. Katya Malinova, Associate Professor | DeGroote School of Business

Dr. Katya Malinova is an Associate Professor and holds the Mackenzie Investments Chair in Evidence-Based Investment Management at the DeGroote School of Business, McMaster University. She holds grants from SSHRC and has published in top journals, including the Journal of Finance and the Journal of Financial Economics. Katya collaborated with Canadian regulators on research and served on the OSC Market Structure Advisory Committee. She is on several editorial boards and teaches corporate finance and FinTech.



Dr. Thomas Marois, Professor of Political Economy | McMaster University

Thomas Marois is Professor of Political Economy, Director of the Public Banking Project, and Tier 1 Canada Research Chair in Public Banking for Sustainability, Inclusion and Prosperity at McMaster University, Canada. He is a leading scholar of public banks worldwide, focusing on public-public collaboration for the financing of green and just transitions. Thomas is author of the award-winning 2021 book *Public Banks: Decarbonisation, Definancialisation, and Democratisation* (Cambridge University Press).



Dr. Brent McKnight, Associate Professor | DeGroote School of Business

Brent McKnight is an Associate Professor of Strategic Management at the DeGroote School of Business, McMaster University. Dr. McKnight studies how firms and organizations address complex societal problems including resilience and adaptation to natural disasters and the COVID pandemic. Dr. McKnight is the director of the Integrated Business and Humanities program where his teaching draws heavily on community-engaged and experiential learning approaches.



Stephanie Robertson, Founder & CEO | SiMPACT Strategy Group

Stephanie Robertson is Founder and CEO of SiMPACT Strategy Group (2004), Board Member, Social Value Canada (2013-), and Co-Chair, Social Value International (2023-). She works with corporations, governments, and communities, to express the value of impact. Born in Montreal, raised in Toronto and Waterloo, Stephanie's formative professional years combine experiences in Ottawa, London (UK), Calgary, and Toronto. She is a leading expert in the role of impact value to inform the relationship between business and society.



Oscar Roque, VP and Head, Interac Verified

Oscar Roque, an international innovation strategist, merges business acumen with social purpose to foster positive change. Currently VP & Head of Interac Verified, he leads product teams ensuring secure, consumer-driven authentication and verification for Canadians. With prior roles as VP of Transformation and VP of Strategy & Innovation at Interac Corp., Oscar spearheaded transformation and corporate strategy efforts. He is the Fintech Program Advisory Chair for Seneca College, has an MBA from Rotman and BSc in Computer Engineering from Queen's.



Dr. Paul Snowdon, Assistant Professor | DeGroote School of Business

Dr. Snowdon is a faculty member in the Strategic Management area, and is the Co-Director of the Engineering & Management program at McMaster. He lectures in the capstone undergraduate courses and teaches Management Consulting in the MBA program. Prior to joining academia, Dr. Snowdon worked for over 25 years as an engineer, change agent, global consultant, and entrepreneur. As a result, he brings a unique perspective on how strategic management is applied in practice, both locally and abroad.



Mark Strang, SVP, International Banking Compliance | Scotia Bank

Mark is the SVP Compliance for International Banking and Corporate Functions at Scotiabank. He set up International Banking's AML/ATF, Compliance, Operational Risk and Regulatory Project areas and established Global Privacy and Corporate Function Compliance programs, responsible for GBM Compliance, Enterprise Programs and Culture and Conduct Compliance. Prior to joining Scotia, he worked in CIBC, and as a lawyer in government and private practice. He holds a B.A. from the University of Toronto, J.D. from Queens University, MBA from Western University and LLM from York University and is a member of the Ontario Bar.



Keith Taylor, Executive Director | DUCA Impact Lab

Keith Taylor is the inaugural Executive Director of The DUCA Impact Lab at DUCA Credit Union. During his career at DUCA, he has led the development of Canada's first social purpose mortgage product and its certification as a B-Corp. Keith is a League of Intrapreneurs Fellow and active member of the BMW Foundations Responsible Leaders network. He serves as Board Chair for Social Value Canada and as a Board Director at New Power Labs. He holds an MBA from the Schulich School of Business, a BA from Saint Francis Xavier University.



Tom Vargas, Research Lead | New Power Labs

Tom Vargas is the Research Lead at New Power Labs. He has worked with think tanks, research organizations, and government agencies across the Americas to provide decision-makers with rigorous evidence and insights to generate impact. His award-winning published work appears in *World Development*, *Comparative Politics*, and *International Studies Perspectives*. He holds a PhD in Political Science from the University of Minnesota.



Dr. Kevin Veenstra, Associate Professor | DeGroote School of Business

Dr. Kevin Veenstra is an Associate Professor of Accounting at the DeGroote School of Business, McMaster University, with publications in top accounting and business ethics journals. He holds CA, CMA, CPA, and CFA designations. He also has extensive relationships with CFA Society Toronto serving such roles as finance committee member, university relations committee member, ethics trainer, case writer, and Hillsdale Research Award Reviewer/Judge; serves as the faculty advisor for the DeGroote Finance and Investment Council (DFIC), and has worked in a number of progressive roles, including external and internal auditor.



Molly Willats, Head of Financial Health Strategy | Fintech Cadence

Molly Willats is the Head of Financial Health Strategy and Ontario Lead at Fintech Cadence, a non-profit organization that supports the Fintech ecosystem across Canada. In 2019, Molly co-founded a non-profit called Innovate Financial Health and has supported dozens of founders in their pursuit of more equitable and accessible financial services. Molly sits on the Financial Consumer Agency of Canada's Research Committee for Financial Literacy and is the chair of the Financial Services Taskforce at the Canadian Centre for Women's Empowerment. She holds a Masters in Human Geography from the University of Toronto.



Sara Wolfe, External Director for Wilson College | McMaster University

Sara Wolfe is the External Director for Wilson College at McMaster University, a new program for studies in Leadership and Civic Engagement opening in 2025. She is Anishnawbe and a proud citizen of Brunswick House First Nation in Northern Ontario. Sara is an established executive leader who works through an equity lens at the intersections of health and wellbeing, governance, and impact. Her background includes running a national Indigenous impact investing program, independent consulting and facilitation on inclusive governance and governance reform, and more than 25 years of clinical and research practice as a midwife and a nurse. Sara is dedicated to creating transformative solutions that drive sustainable development and equity for all.