

# Awards Dinner 2008



In honour of the School of Accounting and  
Finance scholarship winners and the  
donors of these financial awards

In recognition of the Fellows for 2008 and  
the distinguished alumni for whom the  
Fellowships are named



200 University Avenue West, Waterloo, Ontario, N2L 3G1  
[www.saf.uwaterloo.ca](http://www.saf.uwaterloo.ca) ■ [www.afm.uwaterloo.ca](http://www.afm.uwaterloo.ca)  
519-888-4567 ext. 36536  
Fax: 519-888-7562

**November 7, 2008**  
6:30 Reception | 7:00 Dinner  
Fed Hall, University of Waterloo

## About the Society

The AFM Fellowship Society is being formed to recognize the achievements of Fellows and Honourees who have participated in the School of Accounting and Finance Fellowship program. The Society aims to recognize the significant contribution that Student Fellows and their Honourees have made to the program and the School over the course of their years at UW. The Society will provide a forum for ongoing communication between the Fellows and Honourees as the Fellows continue to grow and develop into the leaders of tomorrow.

Members of the Fellowship Society can participate in the program in the following ways:

- Become a new or returning Honouree
- Nominate others to be Honourees
- Receive invitation to school events
- Receive annual updates on the program and the newly named Fellows and Honourees
- Participate in Fellowship nominee interview panels

## Recognition of AFM Fellowship Society Membership

Members of the AFM Fellowship Society will be recognized at the annual Fellowship dinner, as well as by having their name listed on the SAF website.



Professors Grant Russell and Bob Sproule with six of this year's twelve graduating Fellows.



The Fellowship Program of the School of Accounting and Finance was established in 2003 with the first class of students entering the new Bachelor of Accounting and Financial Management program. It aims to cultivate outstanding leaders and future professionals by recruiting excellent students, providing them with opportunities to grow and develop, and recognizing their success and accomplishments. There are now more than 80 students in the Fellowship Program. Each student receives a financial award of up to \$7,000, paid over the course of their 4 years of study. The program is funded by the School of Accounting and Finance.

## The Role of a Fellow

Fellows begin to hone their communication and leadership skills by participating in our Ambassador Program and Recruitment events in years 1 and 2. As upper-year students, Fellows have the opportunity to work directly with individual professors, complementing classroom and co-op learning experiences with teaching and research assistantship commitments; or take on a peer leadership function as part of our residence Living-Learning Community. The Fellows must also maintain a high standard of academic excellence to remain in the Fellowship Program.

## Selection of Fellows

The School of Accounting and Finance looks for students who display academic excellence, leadership skills and the desire to engage both in the School and in extra-curricular activities. Fellows are selected on the basis of an interview, performance in the Accounting and Financial Management Admissions Assignment, the Admissions Information Form, and their academic record.

## Nomination of Honourees

The "naming" of each Fellowship after an illustrious alumnus provides an opportunity for the School of Accounting and Finance to recognize the achievements and support of the School by the alumnus. In addition, this provides the Fellows with role models who could be helpful to their own professional objectives. Nominations of University of Waterloo alumni who exemplify the spirit of the program are welcome.

# Reflections on Fellowship



"Being an SAF Fellow means that we represent accounting students and faculty with a sense of pride. By being active members in Waterloo's rich mosaic through getting involved or excelling academically, we show how accounting students bring life, integrity and passion to the campus."  
-David Ha, Fellow, 4<sup>th</sup> year AFM-PA

"Being a Fellow definitely made my experience at the University of Waterloo more interesting and fulfilling. Through the Fellowship program, I was able to work with and **get to know professors** by being a TA and an RA. I was also able to meet other accounting students through my role as a Peer Leader for the Living-Learning Community. Moreover, the Fellowship program gave me an opportunity to **connect with an accounting alumnus**. It was great talking to my Honouree, Carrie, because I could get a glimpse of what my life, both professional and personal, could be like after university. Since she went through the UW accounting experience herself, she could give me **valuable advice** on what to expect."

-Iris Leung, Graduating Fellow, MAcc 2008

"Being an SAF Fellowship Honouree has been a rewarding experience. It's been wonderful watching the development of Iris Leung, my Fellow, over the years. I feel honoured to have been named an Honouree and given the opportunity to **play an influencing role** in the development of a future professional."

-Carrie Boutcher, 2003 Honouree  
MAcc 1992, CA  
Armtec Infrastructure Income Fund

## 2008 Fellows

**Kalpita Chakrabarty ■ The Janet Ainslie Fellow**

Janet Ainslie, MAcc 1991, CA  
Bishop Strachan School

**Gladys Chau ■ The Bryan Aldred Fellow**

Bryan Aldred, MAcc 2004, CMA  
Kellogg Canada

**Gigi D'Souza ■ The Shikha Gandhi Fellow**

Shikha Gandhi, MAcc 2004, CA  
Deloitte

**Amna Fiaz ■ The Lynn Wilson Fellow**

Lynn Wilson, BMath 1982, MEd, CA  
Ernst & Young

**Eunice Heo ■ The Brenda Brazier Fellow**

Brenda Brazier, MAcc 1987, CA  
Deloitte

**Ian Kan ■ The Donald Brazier Fellow**

Don Brazier, MAcc 1987, CA  
Ontario Power Generation

**Sharon Hyun Kim ■ The Kevin Strain Fellow**

Kevin Strain, MAcc 1990, CA  
Sun Life Financial

**Sharon Lee ■ The Barbara Chiu Fellow**

Barbara Chiu, MAcc 1991, CA, CMA  
Telus

**Angela Li ■ The Sharon Ng Hayes Fellow**

Sharon Ng Hayes, MAcc 2004, CA  
Hudson's Bay Company

**Brian Liu ■ The Chuck Ormrod Fellow**

Chuck Ormrod, BMath 1982, CA  
KPMG

**Florence Mok ■ The Pamela Egan Fellow**

Pam Egan, BA 1987, CMA  
Protox Therapeutics Inc.

**Phi Nguyen**

*to be announced*

**Eunice Pang**

*to be announced*

**Gavin Pereira ■ The William Scott Fellow**

Bill Scott, PhD, FCA  
Distinguished Professor Emeritus,  
University of Waterloo

**Deanna Yimin Qi ■ The Robert O'Connor Fellow**

Rob O'Connor, BMath 1988, CA  
Deloitte

**Gregory Rook**

*to be announced*

**Lucy Xie ■ The Jay Chai Fellow**

Jay Chai, MAcc 2000, CA  
Deloitte

**Emily Zhu ■ The Hurb Jackson Kumaasi Fellow**

Hurb Jackson Kumaasi, MAcc 1985, CMA  
Bank of Nova Scotia

**Jonas Kai Yeung Lau**

The Art Hedlam Entrance Scholarship

**Yang Liu**

The Art Hedlam Entrance Scholarship

**Xinyan Wang**

The Art Hedlam Entrance Scholarship

**Matthew Lowe**The ASEC Scholarship for  
Extraordinary Academic Success**Natalie Kong**The ASEC Scholarship for  
Extraordinary Academic Success**Florence Mok**

The Bill Harvie Scholarship

**Jenny Wong**The Boris & Karen Bong Entrance  
Scholarship**Vivek Bansal**The BMO Financial Group Entrance  
Scholarship**Danielle Malfara**The Catherine EB Hanna Accounting  
Entrance Scholarship**Brian Liu**The Catherine EB Hanna Accounting  
Entrance Scholarship**Dong Lei Han**The Catherine EB Hanna Accounting  
Entrance Scholarship**Zohair Khokhar**The Catherine EB Hanna Accounting  
Entrance Scholarship**Phi Nguyen**The Catherine EB Hanna Accounting  
Entrance Scholarship**Kalpita Chakrabarty**The Catherine EB Hanna Accounting  
Entrance Scholarship**Eunice Heo**

The Chachra Family Accounting Scholarship

**Sharon Lee**

The Christopher &amp; Claire Govan Scholarship

**Gigi D'Souza**

The Christopher &amp; Claire Govan Scholarship

**Andrew Macdonell**

The Cowperthwaite ASEC Leadership Award

**Jie Peng**

The David &amp; Elizabeth Forster Scholarship

**Jingjing Cao**The Federation of Chinese Canadian  
Professionals (FCCP) Education Foundation  
Entrance Scholarship In Accounting**Tian Chi Zheng**

The Friar Luca Pacioli Entrance Scholarship

**Daniel Pacione**

The Friar Luca Pacioli Fellowship

**Kelly Wong**

The Friar Luca Pacioli Fellowship

**Qing Zhao**

The Friar Luca Pacioli Fellowship

**Lantian Zhou**

The Friar Luca Pacioli Scholarship

**Deanna Yimin Qi**The JTI – Macdonald Corp. Entrance  
Scholarship**Shaina Chawla**The Lloyd Carr-Harris Foundation  
Scholarship**Sylvia Przychodzki**The Lloyd Carr-Harris Foundation  
Scholarship**Lucy Wang**The Lloyd Carr-Harris Foundation  
Scholarship**Matthew Chan ■ The Mike Garvey Fellow**

Mike Garvey, BA 1969, FCA

PricewaterhouseCoopers

**Ellen Xiao Dong ■ The Janice Deganis Fellow**

Janice Deganis, BA 1990, CA, CMA, CPA

Ernst &amp; Young

**Jessica Everest ■ The Cindy Ditner Fellow**

Cindy Ditner, MAcc 1986, CA, CMA

BDO Dunwoody

**Stephanie Gates ■ The Steve Aldersley  
Fellow**

Steve Aldersley, PhD Math 1978, FCA

Ernst &amp; Young

**David Ha ■ The Andrew Bauer Fellow**

Andy Bauer, MAcc 2003, CA

PhD student, University of Waterloo

**Brooke Hancock ■ The Upkar Arora Fellow**

Upkar Arora, MAcc 1985, CA, CMA

Illumina Partners

## Graduating Fellows

**Anubha Arora ■ The David Rozee Fellow**

David Rozee, BMath 1988, CA

PricewaterhouseCoopers

**David Catarino ■ The Chris Govan Fellow**

Chris Govan, MAcc 1993, CA

Onex Corporation

**Joanne Chow ■ The Brian D. Leader Fellow**

Brian Leader, BA 1975, FCA

Institute of Chartered Accountants of Ontario

**Jeanne Du ■ The Kenneth J. Klassen Fellow**

Ken Klassen, MAcc 1989, PhD, FCA

School of Accounting and Finance

**Desmond Lau ■ The Steve Glover Fellow**

Steve Glover, BMath 1975, MBA, FCA

Eagle Rock Exploration Ltd.

**Iris Leung ■ The Carrie Boutcher Fellow**

Carrie Boutcher, MAcc 1992, CA

Armtec Infrastructure Income Fund

**David Lin ■ The Robert Harding Fellow**

Bob Harding, BMath 1980, FCA

Brookfield Asset Management

**Rajan Shah ■ The Tim Bauer Fellow**

Tim Bauer, MAcc 2003, CA

PhD student, University of Waterloo

**Bridget Stockie ■ The Donald C. Craig  
Fellow**

Don Craig, BMath 1974, FCA

Deloitte

**Bo Wang ■ The Keith Farlinger Fellow**

Keith Farlinger, BMath 1977, FCA

BDO Dunwoody

**Julia Jun Zhou ■ The David Forster Fellow**

David Forster, BMath 1979, CA

PricewaterhouseCoopers

**Alicia McTaggart ■ The John R. Hanna Fellow**

Jack Hanna, PhD, FCA

Distinguished Professor Emeritus, First Director of  
the School of Accounting and Finance**Natalie Muzyczka ■ The Aleksander R. Olsen Fellow**

Alek Olsen, MBA

Professor Emeritus, First full-time Accounting  
Professor at the University of Waterloo**Kristan Pielt ■ The Teresa Fortney Fellow**

Teresa Fortney, BMath 1986, FCMA

Maple Leaf Foods

**Sherlaine Tai ■ The Scott Wetmore Fellow**

Scott Wetmore, BMath 1978, CA

KPMG

**Gigi Tat ■ The Jerry Whelan Fellow**

Jerry Whelan, BMath 1976, FCA, CISA

PricewaterhouseCoopers

**Tiffany Wong ■ The Norbert Woo Fellow**

Norbert Woo, MAcc 2002, CA, CPA

Rogers Wireless Division, Rogers  
Communications

**Vicky Au ■ The Suzanne Hubbard Fellow**

Suzanne Hubbard, BA 1992, CA, CPA  
PricewaterhouseCoopers

**Amy Yen-Mei Chan ■ The Betty Ann Jarrett Fellow**

Betty Ann Jarrett, MAcc 1986, CA  
PricewaterhouseCoopers

**Miranda Chen ■ The Mary Jo Fedy Fellow**

Mary Jo Fedy, MAcc 1988, CA  
KPMG

**Tak-Lan Chin ■ The Tim Rollins Fellow**

Tim Rollins, MAcc 1996, CA  
Research In Motion

**Stephanie Ching ■ The Kevin Elop Fellow**

Kevin Elop, MAcc 1989, CA, CMA  
Christie Digital Systems Canada

**Mary Chi Yan Chu ■ The Leonard Eckel Fellow**

Len Eckel, PhD, FCA  
Retired Professor, School of Accounting  
and Finance

**Reece Hiland ■ The James Kopperson Fellow**

Jim Kopperson, MAcc 1991, CA, CPA  
RDM Corporation

**Eric Kam ■ The Tim Jackson Fellow**

Tim Jackson, BA 1991, CA  
Tech Capital Partners Inc.

**Simon Kwan ■ The Darko Lakota Fellow**

Darko Lakota, MAcc 2000, CA, CFA  
RBC Financial Group

**Richard Le Page ■ The Andrew Dunn Fellow**

Andrew Dunn, MAcc 1987, CA, CMA  
Deloitte

**Laurence Leung ■ The Doug McPhie Fellow**

Doug McPhie, BES 1978, CISA, CPA, FCA  
Ernst & Young

**\*Karen Ngai ■ The Christine I. Wiedman Fellow**

Christine Wiedman, MAcc 1988, PhD, FCA  
School of Accounting and Finance

**Saem Ok ■ The Carol Leaman Fellow**

Carol Leaman, MAcc 1989, CA  
AideRSS

**Yuwei Ren ■ The Eric Borromeo Fellow**

Eric Borromeo, MAcc 1990, CA, CFA  
BNP PARIBAS (Canada)

**\*Jonathan Sue ■ The John Gossling Fellow**

John Gossling, BMath 1989, CA  
Rogers Communications

**Gloria Yuen Tin Tai ■ The David T. Carter Fellow**

David Carter, MBA 1969, FCA  
Professor Emeritus, Honourary Member,  
University of Waterloo

**Brian Chun Sum Tang ■ The Dan Rogozynski Fellow**

Dan Rogozynski, MAcc 1990, CA  
Swiss Chalet Division, Cara Operations

**Betty Bik-Yee Tien ■ The Angela Holtham Fellow**

Angela Holtham, BMath 1972, FCMA  
The Hospital for Sick Children

**\*Lucy Wang ■ The Karen Wilkinson Fellow**

Karen Wilkinson, MAcc 1990, FCA  
Deloitte

**Lily Liming Ye ■ The James Schlegel Fellow**

Jamie Schlegel, MAcc 1992, CA  
RBI Schlegel Holdings Inc.

**Meng Wang**

The Lloyd Carr-Harris Foundation  
Scholarship

**Lucy Xie**

The Lloyd Carr-Harris Foundation  
Scholarship

**Anita Cho**

The Mary Ann Finn Entrance Scholarship

**William Yiding Zhao**

The Merrill Lynch Scholarship of  
Excellence in Accountancy Studies

**Amanda Chu**

The Morley Lemon Family Scholarship

**Essence Ng**

The Robert E. Gobeil Auditing Scholarship

**Yari Wang**

The Robert Kerr Scholarship

**Gladys Cha**

The Robin K. Banks/Pacioli Entrance  
Scholarship

**Edwin Chan**

The Robin K. Banks/Pacioli Scholarship

**Stephanie Ching**

The Robin K. Banks/Pacioli Scholarship

**Ian Gutwinski**

The Robin K. Banks/Pacioli Scholarship

**Teann Ho**

The Rozee Scholarship

**Manav Kapoor**

The Russell Family Scholarship

**Emily Vanderkruk**

The Scotiabank Accounting Entrance  
Scholarship

**Anna Hon**

The Scotiabank Accounting Entrance  
Scholarship

**Tanisha Ahmed**

The So Family Scholarship

**Lin Liu**

The Stern Cohen Accountancy Studies  
Scholarship

**Howard Leung**

The UW Alumni Scholarship

**Jing Ru Li**

The UW Alumni@BDODunwoody  
Scholarship

**Zoe Lyons**

The W J Schlatter Accounting  
Scholarship

**Franc Vodopivec**

The W J Schlatter Accounting  
Scholarship

**Gavin Pereira**

The Whelan Entrance Scholarship

**Emily Zhu**

The Whelan Entrance Scholarship

## Additional School of Accounting and Finance Scholarships and Donors

The Andrew Dunn Scholarship  
The Barr Family Entrance Scholarship  
The CASF Scholarships Grad Class Accounting  
Scholarship  
The CMA Management Accounting Student of  
Merit Award  
The David T. Carter Scholarship

The Engineering, SAF Scholarship  
The Ives Family Entrance Scholarship  
The Shawn Porter Entrance Scholarship  
The SBLR LLP Award in Chartered Accountancy  
The UWAlumni@Ernst & Young Scholarship Fund  
The Waterloo-Wellington Chartered Accountants  
Association Scholarship

\* new appointments as of 2008

**Hector Abullarde-Gamez ■ The Paul Langill Fellow**

Paul Langill, MAcc 1991, CA

TD Bank Financial Group

**\*Nilofer Ahmed ■ The Alison Jackson Fellow**

Alison Jackson, MAcc 1997, CA, CFP, CPA

Ernst &amp; Young

**Catalina Anghel ■ The Margaret Shackell-Dowell Fellow**

Margaret Shackell-Dowell, MAcc 1990, PhD, CA

Cornell University, Johnson Graduate School of Management

**Cynthia Chan ■ The Elizabeth Demers Fellow**

Elizabeth Demers, MAcc 1990, PhD, CA, CBV, CMA

INSEAD, France

**Annie Chen ■ The Juli-ann Kapsa Fellow**

Juli-ann Kapsa, MAcc 2003, CA

Deloitte

**Mei Chen ■ The Tracy Elop Fellow**

Tracy Elop, MAcc 1989, CA

Elop Consulting

**Mandy Cheng ■ The Jessica Chiu Fellow**

Jessica Chiu, MAcc 2004, CA

PricewaterhouseCoopers

**Carolyn Harriss ■ The Alexandra Hardy Fellow**

Alexandra Hardy, MAcc 1999, CA

BDO Dunwoody

**\*Carrie Lau ■ The Bill Cummings Fellow**

Bill Cummings, MAcc 1989, CA

Deloitte

**Jonathan Cheuk-Hank Lau ■ The Mike Dean Fellow**

Mike Dean, BMath 1992, CA, CIRP,

Licensed trustee in Bankruptcy

Ernst &amp; Young

**Shuk-Laam Lo ■ The Theresa Libby Fellow**

Theresa Libby, PhD 1996, CA

Wilfrid Laurier University, School of Business and Economics

**Christina Ng ■ The Angela McNeill Fellow**

Angela McNeill, MAcc 1994, CA, CIA

Sun Life Financial

**Eugenia Ng ■ The Suzanne Patfield Fellow**

Suzanne Patfield, BA, Diploma 2003, CA

St. Jerome's University

**Sharjil Salim ■ The Jane Ritchie Fellow**

Jane Ritchie, MAcc 1987, CA, CMA

Ritchie &amp; Shortt, Chartered Accountants

**Aleena Siddiqi ■ The Cristina Shortt Fellow**

Cristina Shortt, MAcc 1987, CA, CMA, CFP

Ritchie &amp; Shortt, Chartered Accountants

**Meng Wang ■ The Cary List Fellow**

Cary List, BMath 1985, CA, CFP

Financial Planners Standards Council

**Sandi Yen ■ The Jill Pletsch Fellow**

Jill Pletsch, MAcc 2000, CA

Conrad Grebel University College

**Akua Acheampong ■ The Doug****Johnson Fellow**

Doug Johnson, MAcc 1985, CA, CIA, CISA

Royal Bank of Canada

**\*Kimberly Aitkin ■ The Jill Stewart Fellow**

Jill Stewart, MAcc 1992

Autoliv Inc.

**Irvin Choo ■ The Glenn Feltham Fellow**

Glenn Feltham, PhD 1994, LLB, FCMA

University of Manitoba School of Business

**\*Mirna Gerges ■ The Julie Robson Fellow**

Julie Robson, MAcc 1992

School of Accounting and Finance

**Jody Grewal ■ The Cindy Veinot Fellow**

Cindy Veinot, MAcc 1991, CA, CMA, CPA

Deloitte

**Sherry Xin Yue Gu ■ The Laura-Lee Brenneman Fellow**

Laura-Lee Brenneman, MAcc 2004

Deloitte

**Ye Han ■ The Rod Barr Fellow**

Rod Barr, BA 1969, FCA

Deloitte

**Ismat Jahan ■ The Roger Witteveen Fellow**

Roger Witteveen, MAcc 1993, CA

Research In Motion

**Lu Jiang ■ The Peggy Mulligan Fellow**

Peggy Mulligan, BMath 1981, FCA

Biovail Corporation

**Grace Lam ■ The Tim Wilson Fellow**

Tim Wilson, MAcc 1999, CA

Deloitte

**Linda Lam ■ The Geoff Hayes Fellow**

Geoff Hayes, MAcc 2004, CA

Barrick Gold

**Hoi-Yan Millie Law ■ The Shawn Porter Fellow**

Shawn Porter, MAcc 1988, CA

Deloitte

**Christine Leung ■ The Jennifer Fiddian-Green Fellow**

Jennifer Fiddian-Green, BA 1994,

CA, IFA, CAMS, CMA, CFI, CFE

Grant Thornton

**Steven Ly ■ The Morley Lemon Fellow**

Morley Lemon, PhD, FCA

Former Director, School of Accounting and Finance

**Milan Shah ■ The Ed Henderson Fellow**

Ed Henderson, MAcc 1989, CA

MTD Products Ltd.

**Robert Tutins ■ The Alister Mason Fellow**

Alister Mason, PhD, FCA, FCMA

Former Director, School of Accounting and Finance

Canadian Public Accountability Board, Toronto

**\*Nadia Veira ■ The Elaine Lee Fellow**

Elaine Lee, BA 2003, CMA

Liquor Control Board of Ontario (LCBO)

**Tian Li Xie ■ The Jesse Waltman Fellow**

Jesse Waltman, MAcc 2005

Look Communications Inc.