

# Canadian Executive Women in the Investment Industry

PEOPLE INTELLIGENCE<sup>®</sup> REPORT

# TALENT STUDY

This study focused on a pool of high performing women executives in the investment industry. The purpose of the report was to support a large Canadian Credit Union Association's growth by concentrating on the advancement of women.

The aim was to target strong potential candidates for future career opportunities with the Association. A secondary goal of the study was to examine gender diversity by identifying best-in-class programs at the companies throughout the industry.

# Survey Demographics PARTICIPANTS OVERVIEW

## Overall Study

370 women identified

165 women participated

143 valid participants chosen

## Second Languages

French: 51%

Spanish: 15%

Italian: 8%

Russian: 5%

Arabic: 2%

German: 2%

Korean: 2%

Greek: 1%

Croatian: 1%

Farsi: 1%

Serbian: 1%

## Age

Under 35: 9%

35 to 44: 44%

45 to 54: 38%

55 to 65: 8%

# PARTICIPANTS OVERVIEW

## Areas of Expertise

Stock Market: 9%

Private Equity: 5%

Infrastructure: 2%

Fixed Income: 14%

Asset Allocation: 4%

Risk Management: 13%

More than One: 23%

Other: 28%

There is significant movement between areas of specialization in the investment industry as women progress in their careers and many focus on more than one sector at a time.

# PARTICIPANTS OVERVIEW

## Executive Level

Women are continuing to find it difficult to compete with men for the executive level roles while managing work-life balance and family responsibilities.

Often, they are leaving the internal corporate leader-relationship positions for customer facing / sales positions to alleviate the heavy workload and take control of their time commitments.

Board Member: 4%  
President / C-Suite: 10%  
SVP: 6%  
EVP: 2%  
VP / AVP: 31%  
Head: 2%  
Director: 26%  
Below Director: 20%

# PARTICIPANTS OVERVIEW

## Region

Nova Scotia: 1%  
New Brunswick: <1%  
Quebec: 21%  
Ontario: 61%  
Manitoba: 2%  
Saskatchewan: 3%  
Alberta: 5%  
British Columbia: 7%



20%

women are open to considering opportunities with new employers and would consider relocation for the right career advancement opportunity

# Survey Demographics COMPANIES OVERVIEW

**33** Target Companies Considered

# COMPANIES OVERVIEW

## Diversity Initiatives

### 4 Best-in-class companies were identified

They lead in innovative practices focusing on women in leadership by implementing visibly distinctive programs aimed at helping women succeed.

Also, they have appointed designated contacts in the company with a least partial responsibility focused on the advancement of women.

# COMPANIES OVERVIEW

## Diversity Initiatives

Some of those initiatives considered are:

- Awards
- Conferences
- Networking Events
- Sponsorship
- Scholarship
- Mentorship & Coaching
- Diversity Councils
- Family Support
- Campus Recruitment



75%

targeted companies are implementing gender diversity programs of varying degrees

# COMPANIES OVERVIEW

## Key Findings

There is a correlation between the number of women in executive level roles with companies that have gender diversity initiatives.

Though the percentage of companies which are implementing diversity programs is high, there is the perception that measurable actions are not being put into place to realistically achieve equality for women in leadership.

To get a detailed copy of the full-length report or to have a study tailored to your companies needs, visit:

<http://intellidig.com/services/talent-intelligence>

# ABOUT US

Intellidig is a specialized research firm that delivers human capital intelligence and innovative talent sourcing to business leaders. We pride ourselves on being a local partner with a global reach. With a proven and innovative methodology, Intellidig combines recruiting with the most advanced process in research and talent acquisition services.

We have proven that our success is based on our approach, not the industry in which we focus.

Because research is the basis of all our work, Intellidig has pioneered the People Intelligence® reports. Our customized reports reveal a detailed and meaningful portrait of the talent landscape combined with real-time data providing unparalleled strategic insights and recommendations to help businesses make better, more informed talent related decisions.