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DU CANADA

## Bill Charles, CFP – Joined Board 2020

President & CEO, Global Maxfin Investments

Bill Charles is the Chief Executive Officer of Global Maxfin Investments Inc. and Global Insurance Solutions Inc. In this role, he is responsible for the overall leadership, direction, growth and profitability of the MFDA Dealership and MGA Business. He also acts as the UDP for the MFDA Dealer.

Bill assumed this role in May 2018 after 27 years with Investors Group. He started in the industry as an Advisor and quickly built up a book to over \$20 million in assets before moving to the Branch Manager role. As a Branch Manager, Bill ran one of the fastest growing and most successful offices in Canada for 13 years. He, then, became Senior Vice President overseeing all aspects of Distribution, Sales, Asset Growth and 2000 Advisors in Ontario and Atlantic Canada.

He has also been a key note speaker on many different occasions; has spoken at the IFIC Annual Conference and the Investment Funds Forum regularly and has participated in the OSC round tables.

Bill served on the Board of Directors of the MFDA from 2011 to 2013. He is on the Board of Coast to Coast against Cancer, a former member of the Board of Directors of the Brampton Rotary Club. Bill is also very active in many sports and coaches hockey. He holds a BA (Finance & Economics) from the University of Western Ontario and is a Certified Financial Planner.