

STIRLING V.T. SHULTZ, BA, CFP

PROFESSIONAL and EDUCATIONAL:

- 2000 Conduct and Practices Course
- 2000 Financial Planners Standards Council (Member)
- 2000 Certified Financial Planner Course
- 1998 Professional Financial Planning Course
- 1996 Canadian Securities Course
- 1995 The University of British Columbia, B.A. (Eng. Lit.)
- 1993 Mutual Fund License

OCCUPATIONAL:

- 2002 - present Vice-President, Clayton Shultz & Associates, Inc., a company specializing in business valuation, financial planning, mediation and arbitration, and litigation support for securities, quantification of losses, and other related matters.
- 1992 - 2002 Canadian Imperial Bank of Commerce, Vancouver, BC
 - 1998 - 2002
 - Senior Financial Advisor, Imperial Investor Services
 - Duties: Managing an investment portfolio of \$80 million for high net-worth clients, and serving as Acting General Manager, Wealth Management, Vancouver West Side, in absence of supervisor
 - 1996 - 1998
 - Small Business Associate
 - 1993 - 1996
 - Personal Banking Representative
 - 1992 - 1993
 - Customer Service Representative

VOLUNTEER EXPERIENCE:

- 1993 - 2001 United Way Representative