

**NAME**

Patrick J. O'Meara  
6-242 920 Mohawk St.  
Lewiston, NY  
USA  
14092  
Cell: 416-577-1095  
pomeara@niagara.edu

**DATE**

February, 2019

**COMPLETED ACADEMIC DEGREES**

<u>Degree Name</u>	<u>Subject Area</u>	<u>Where Completed</u>	<u>Date of Completion</u>
MBA	Finance	Niagara University (AACSB)	May, 2004
Bachelor of Commerce	Finance	University of Windsor	May, 1999
Bachelor of Arts	Political Science	U.W.O.	May, 1992

**ADVANCED STUDIES IN PROGRESS**

<u>Degree Name</u>	<u>Subject Area</u>	<u>Where Enrolled</u>	<u>Est. Completion Date</u>
HRPA	Human Resources	HRPA (Ontario)	2021

**ACADEMIC APPOINTMENTS**

<u>Appointment Level</u>	<u>Institution</u>	<u>Dates</u>	<u>Subject Area</u>
Professor	SAIT	2015-2017	Finance and Accounting
Instructor	Red Deer College	2006-2014	Finance and Global Bus.
Adjunct Professor	Niagara University	2004	International Finance International Management
Graduate Assistant	Niagara University (AACSB)	2002-2004	Finance
Co-Chair	SAIT	2016	Scholarly Research Com.
Asst. Professor	Niagara University	2018/19	Accounting and Finance

**ADMINISTRATIVE APPOINTMENTS**

<u>Appointment Level</u>	<u>Institution</u>	<u>Dates</u>	
Coordinator	Red Deer College	2006-2010	Dipl. in Financial Services
Chair	Red Deer College	2010-2012	Business & Commerce
Chair	Red Deer College	2011/2012	Academic Council
Chair	Centennial College	2013-2014	Finance & Accounting
Member – B.O.G.	Retirement Institute of Cda.	2015	Retirement Planning
Director	Cdn. Inst. of Finl. Planners	2015-16 (Elected)	Financial Planning

**TEACHING EXPERIENCE**

<u>Institution</u>	<u>Dates</u>	<u>Courses Taught</u>
Red Deer College	2006-2013	BADM 260 Introduction to Corp. Finance BADM 240 Personal Selling BUS 310 Advanced Corporate Finance BADM 262 Investments FINS 180 Introduction to Finance FINS 281 Investment Funds in Canada FINS 282 Consumer Credit in Canada FINS 270 Financial Services Selling & Neg. FINS 285 Financial Services Dipl. Capstone FINS 286 Insurance and Risk Man. in Canada MGMT 410 Global Business
Niagara University	2004	FIN 340 International Finance MGT 676 International Management

Centennial College	2013	BFPE 212 Introduction to Financial Accounting
SAIT	2015-17	BFIN 331 Corp. Finance for Managers
		BFIN 2331 Corp. Finance for Managers
		BFIN 301 Corporate Finance
		BFIN 2301 Corporate Finance
		BFIN 255 Introduction to Finance
		BFIN 1255 Introduction to Finance
		CIVL 4010 Real Estate Finance
		BFIN 386 Integrated Concepts in Finance
		BFIN 2386 Integrated Concepts in Finance
Red Deer College	2010-14	Investment Funds in Canada (On-Line Delivery)
CIFP	2014-15 and 2017	Concepts in Finance
		Corporate Taxation I and II
		Advanced Tax Concepts for Financial Planners
Niagara University	2018	ACC 505 Financial and Man. Accounting
		ACC 601 Strat. Accounting Analysis & Planning

## SCHOLARLY PARTICIPATION

### Books Authored or Edited

<u>Date</u>	<u>Activity</u>
2011/12	Conceptualized and Wrote Fundamentals of Retail Credit in Canada
2009/10	Conceptualized and Wrote Applied Personal Finance in Canada
2010	Technical Review of Investment Analysis and Portfolio Management
2010	Technical Review End of Chapter Questions-Fin. Management in Cda.
2012	Technical Review of Financial Math: Theories and Concepts
2011/12	Conceptualized and Wrote Mutual Funds: A Conceptual Approach
2013	Technical Review of Financial Institutions in Canada, Johnston, 1 <sup>st</sup> Ed.
2013	Technical Review of Corporate Fin. in Canada, Ross, Westerfield, CE
2014	Technical Review of Investments in Canada, Bodie, et al, Canadian Ed.
2015	Technical Review of On-line Resources, Corp. Fin, Ross, Westerfield, CE
2015	Technical Review of Corporate Finance, Brigham, Nelson Canada, CE

## ACADEMIC AND NON-ACADEMIC AND PROFESSIONAL PRESENTATIONS AND PAPERS

### Non-Academic Publications

<u>Date</u>	<u>Activity</u>
2009	"You are in Control of Your Financial Destiny", Red Deer Advocate (Non-Academic)
2010	"Three Numbers Your Should Understand", Red Deer Advocate (Non-Academic)
2010	"Canadian Lenders are Cash Flow Lenders", Red Deer Advocate(Non-Academic)
2012	"The Lasting Effects of Education on the Economy", Red Deer Advocate (Non-Academic)
2012/14	Columnist (biweekly) for the Red Deer Advocate – "Easy Money"
2014	CIFP National Conference, CIFP Securities Compliance Program (Presentation)
2014/15	Insurance and Estate Planning, CIFP Current Trends in Financial Planning, '14/'15 Ed.
2015	Insurance and Estate Planning, CIFP Current Trends in Financial Planning, 2014 Ed
2015	The CFP Professional: At the Nexus of Debt and Wealth, National CIFP Conference, 2015
2016	"Alternative Investment and Trading Strategies", National CIFP Conference, 2016
2017	"Forex and the Retail Investor", National CIFP Conferenced, 2017

## PROFESSIONAL MEMBERSHIPS, QUALIFICATIONS and EXPERIENCE

### Professional Memberships

**CFP**, FPSC, Member in Good Standing - Mar., 2015

**Certified Management Accountant (CMA)**, CMA Alberta – September, 2014

**Chartered Professional Accountant (CPA)**, CPA Alberta -September, 2016

**Canadian Institute of Financial Planning (CIFP)**, Toronto, Canada – September, 2015

### Professional Qualifications

**Certified Financial Planner (CFP)**

**Chartered Professional Accountant (CPA)**

**Certified Management Accountant (CMA)**

**Registered Retirement Consultant (RRC)**

### Professional Experience

#### **Senior Director – Training Services, CIFP, Present**

- Executive leadership of national training services to big five Canadian banks
- Lead and manage full and part-time contract faculty on a day-to-day basis.
- Developed new business opportunities in Western Canada
- Reorganized curriculum for a variety of the institute's courses ensuring accuracy of material

#### **Professor, Finance - School of Business, SAIT, 2015-2017**

- Developed curriculum for a variety of bachelor's degree level courses (Corporate Finance, Investments and Financial Planning I and II). **Result: Delivered project outcomes well ahead of due dates which allowed the school of business to deliver curriculum proposals on-time and within budget. Courses were developed for both in-class and on-line delivery.**
- Currently re-developing curriculum for SAIT's Canadian Securities Course (CSC I and II). **Expected Result: By the Winter of 2016 curriculum delivery for these courses was updated to better match SAIT's financial services program and professional/industry competency models.**
- Taught Variety of Finance Courses (Corporate Finance and Real Estate Finance) to groups of up to 40 adult learners. **Result: Met or exceeded student satisfaction metrics for the school of business.**
- Developed and lead two teams of second year students in CIFP Case Competition (March, 2016). **Result: Both SAIT teams placed second and third in the case competition resulting in SAIT's financial services programs being recognized nationally for their high academic standards.**
- Developed and lead two teams of second year students in CIFP Case Competition (March, 2017). **Result: One of the two SAIT teams placed first in the case competition resulting in SAIT's financial services programs being recognized nationally for their high academic standards.**
- Negotiated articulation agreement with the Canadian Institute of Financial Planners (CIFP). Learners completing SAIT's Diploma or BBA in Financial Services are granted advanced standing toward the Registered Retirement Consultant (RRC) professional designation. **Result: Students completing financial services programs at SAIT have advanced insight into the financial services industry.**

#### **Chair, Finance, Accounting, Economics, School of Business, Centennial College (2013-2014)**

- Lead 40 full-time, partial load, sessional and part-time faculty and administrative personnel in a collective bargaining environment in a professional manner. **Result: Gained valuable insight into various managerial aspects of a collective work environment. Managed budget of \$3.5 million. Reduced salary expenses through efficient use of workload planning while maintaining learner centered outcomes.**
- Developed Program Advisory Group for finance and customer service management programs. Using high level of inter-personal and business development skills worked with senior leaders (Vice President, Sr. Vice President and CEO) in financial services industry to gain insights into required changes in curriculum needed to re-brand finance programs offered by the School of Business. **Result: Re-built positive relationships with industry.**
- Working in collaboration with faculty, increased total contact hours through-put of full-time staff by tightly managing workloads according to the college's collective agreement. **Result: Increased average total contact hours per full-time faculty member by 11%. This in turn increased KPI measures - student satisfaction.**
- Lead and managed significant cultural changes in staff. Through the use of collaborative management practices engaged faculty in a process of change in how they viewed their role as faculty and as members of the Centennial College learning community. **Result: Significantly improved faculty morale.**
- Lead comprehensive review of finance and accounting curriculum which resulted in moving programs under my leadership to a 7-1-7 (14 week) semester model. **Result: Achieved significant change in how curriculum will be delivered in future semesters.**
- Lead development of 3 year Advanced Diploma in Finance. **Result: Expanded program outcomes for learners and increased potential revenue sources for the School of Business and the college.**
- Lead development of 1 and 2 year Diplomas in Customer Service Management. **Result: Expanded program outcomes for learners and increased potential revenue sources for the School of Business and the college.**
- Lead re-development of 40 seat live call centre on the college's campus, and its integration with post-modern teaching techniques and technologies. **Result: The re-designed call centre will provide students with real world experience in sales and service techniques and practices. It will also allow faculty to develop skills using modern teaching techniques and technologies, such as, the use of SMART boards. Future potential for revenue generation by partnering with sales and service organizations – non-profits and financial services providers.**

#### **Chair, Business & Commerce – RDC Donald School of Business (2010-2012)**

- Managed 30 full and part-time faculty and administrative personnel in a professional manner. **Result: Gained valuable insight into various managerial aspects of the college including recruitment, and financial management. Managed budget of \$1.3 million. Reduced operating expenses (non-salary expenses by 30%) while maintaining service levels.**

- Chaired faculty hiring committees. **Result: Learned valuable insights into the management of the hiring processes within an academic institution. Recruited excellent teaching/research staff for the Donald School of Business.**
- Developed Educational Strategic Service Plans for 2011/12 and 2012/13 that ensured efficient attainment of strategic goals by working with the Dean, faculty and staff to implement key education/strategic goals. **Result: The School's raison d'être was strongly aligned with college's strategic goals and objectives.**
- Designed and developed work experience options for students in accounting, financial services and marketing programs. **Potential Results: Student's ability to actively apply what they have learned in the classroom will be significantly enhanced through work placements. Employer/college/community relationships will be strengthened and the stature of the Donald School of Business and its programs will be significantly enhanced.**
- Developed and Implemented Entrepreneur in Residence (EIR) program for the Donald School of Business. **Result: Integrated with student work experience options, and the college's Continuing Education Division, the EIR program provides excellent opportunities for learners to leverage up on the experience of successful entrepreneurs in the Central Alberta region while providing an opportunity for credit and non-credit divisions to work together to provide learning development services to Central Alberta business – including the Canada-China Business Association (Edmonton).**
- Led faculty in researching significant changes to the structure of Donald School of Business' diploma programs. **Results: Preliminary research work completed 2010/11/12 can be used by Program Review Committee to complete a more formal review of all programs.**
- Chair/Co-Chaired various committees involved in the creation, design and building of the "new" Donald School of Business. Including the Steering Committee (Co-Chaired with Dean), New Programming Committee (Co-Chair) and Faculty Council (Chair). **Result: The Donald School of Business is deeply integrated in the greater Red Deer business community which will allow for better integration of applied learning strategies and the college's new strategic direction of a "learner centered culture".**
- Chair of Red Deer College's Academic Council (2011/12). Led 21 members, representing various stakeholder groups (students/faculty and administration) in parliamentary discussions regarding the approval of new courses and programs and the amendment of other courses and programs. **Results: The Council, working with its Curriculum Sub-Committee, and various departments and schools, approved the college's Bachelor of Business Administration (BBA) program in General Management. The Council also worked with faculty, administration and students to amend its constitution to change the period of tenure for Council Executive to 2 years. Finally, various other new programs were approved by The Council, including two new Engineering Technology programs.**

#### **Instructor and Coordinator, Diploma In Financial Services (2006-10 and 2013)**

- Developed and/or taught a variety of diploma and university level courses (Corporate Finance, Global Management, Investments, Investment Funds in Canada, etc.). **Result: Gained invaluable insight into the culture of contemporary students and academic life and how to effectively use various modes of active learning in traditional and non-traditional/on-line classroom settings to maximize learner outcomes.**
- Exceeded departmental and college averages in most areas of student feedback evaluations. **Result: Awarded Continuous Appointment in the Spring of 2009. In addition, the class of 2009 recognized my commitment to teaching by publicly honoring my efforts at the**

**college's annual financial services employer appreciation reception with a small gift of appreciation and presentation.**

- Researched, recommended and implemented significant changes to the structure and strategic direction of the college's Diploma in Financial Services, including the elimination of a variety of courses and the re-design of other courses. **Result: Significant redundancies in the program's curriculum were eliminated and student satisfaction with the program improved.**
- Developed and lead the business school's first summer work experience course (FINS 280). An 8 hour credit course designed to increase student's ability to apply learning outcomes of first year business and finance courses through their immersion in a real world/paid work environment. **Result: Students were very well prepared to absorb advanced knowledge in second year courses with learning outcomes, as measured by course assessments, dramatically higher than other business programs. Students were able to actively engage their instructors and other less experienced learners in a highly professional manner. Student satisfaction regarding the program and their career outcomes is significantly higher than other business programs.**
- Successfully negotiated articulation agreements with industry including the Investment Funds Institute of Canada (IFIC), the Canadian Institute of Management (CIM), the Canadian Institute of Financial Planners (CIFP), and the Canadian Institute of Credit (CIC). **Result: Student satisfaction with the Diploma in Financial Services program was increased and student costs for texts and other learning materials was reduced. Students are able to leverage up on their academic work by earning credit towards the mutual funds license in Canada, the Certified Credit Professional and the Registered Retirement Consultant designations.**
- Developed and Chaired the Diploma in Financial Services Industry Advisory Committee. Professionally managed executive level industry relationships. **Result: Significantly improved the image of the program and the School of Business through regular and in-depth consultations regarding program structure, course offerings and the learning outcomes of the program's work experience course (FINS 280). Contributed to the development of significant donations to the college, and the School of Business through collaboration with colleagues in community and donor relations and continuing education.**
- Conceptualized and implemented **"The Job Shadowing Project"** in which 30 first year financial services students spent a day with a financial services professional. **Result: Employers gained valuable insight into student career interests which allowed them to focus recruitment strategies to student and market place demands. Learners gained valuable insights, early in their academic careers, into potential career opportunities.**
- Conceptualized and lead 25 second year students in the School of Business' first "Financial Food for Thought" event in which second year financial services students interacted with students from across the college in providing them with valuable financial knowledge and tools. **Result: Financial awareness amongst students in all programs was improved and the School of Business was able to actively market the financial services program to students out of its traditional markets. Students also gained valuable experience communicating to students in a large audience environment.**
- Developed curriculum and taught e-Campus Alberta courses in financial services, including FINS 282 (Consumer Credit) and FINS 180 (Introduction to Financial Products). **Result: Expanded flexible learning opportunities for students and expanded learning distribution channels of the Diploma in Financial Services.**

**President and Owner, The Innovative Scholar Inc. (2009 – 2019)**

- Hired and professionally and collaboratively managed contract staff to work on various projects. **Result: Developed good relationships with contract staff that enable my company to grow quickly in both sales and reputation.**
- Developed, from the ground up, marketing and branding plans that allow The Innovative Scholar Inc to clearly and professionally communicate its value proposition to customers. **Result: Learned valuable lessons in brand management of a small business, grew profitable sales, and developed corporate reputation.**
- Actively managed client projects to maximize customer and corporate outcomes. Negotiated mutually beneficial agreements with clients. **Result: Managed profitable annual sales growth.**
- Developed and taught on-line courses for corporate clients in sales, mutual funds, financial planning, accounting for managers, finance for managers. **Result: Learners achieved above average success on professional exams, such as, the IFIC, LLQP, CSC and PFP/CFP exams.**
- Managed textbook (finance, accounting, business and financial mathematics and marketing) technical review projects for large Canadian publishing firms delivering completed projects under strict time guidelines and quality controls. **Result: Achieved high client satisfaction and repeat business.**

#### **Columnist for the Red Deer Advocate (2012 – 2014)**

- Developed concept for new personal finance column (“Easy Money”) in local newspaper serving a population base of approximately 85,000. **Result: Leveraging on experience gained in developing my business I was able to develop and market the concept of the new column (“Easy Money”) to the Business Editor of the local newspaper.**
- Working to strict time and quality deadlines write a biweekly column. **Result: Disseminated personal financial literacy to readers in the greater Red Deer community.**

#### **CIBC, Senior Business Advisor (2005 – 2006)**

- Actively managed SME portfolio of approximately \$120,000,000. **Result: Increased portfolio by 10%. Exceeded revenue and profitability targets.**
- Professionally managed complex business relationships with SME business and agricultural customers. **Result: Added value to client’s business operations by consistently offering sound advice. Prevented large fraud of a client’s funds resulting in the avoidance of a significant loss to the client or CIBC.**

#### **Auditor, Deloitte USA LLP, (2004)**

- Actively involved in the audit of public and private companies. **Result: Accurately completed all audit work on time and under budget.**

#### **Niagara University, Adjunct Professor of Business (2004)**

- Taught an undergraduate course in International Finance and a graduate course in International Management. **Result: Gained invaluable experience in the field of post-secondary teaching which provided the impetus for seeking a career in post-secondary education. Positively influenced the educational experience of undergraduate and graduate students from a variety of cultures.**
- Graduate Student Leader, Summer, 2004, Graduate Global Field Study Course, London, U.K.. **Result: Gained valuable insight into the development and operation of study tour courses. Provided students with invaluable insights and exposure to the realities of global business management.**

#### **Niagara University, Graduate Assistant, 2002-2004**

- Tutored students in introductory finance, investments and statistics. **Result: Significantly improved undergraduate and graduate student's academic performance.**
- Assisted in researching and preparing academic papers and marking of assignments. **Result: Added value to the efficient functioning of the department.**
- Redesigned graduate business office on-line application processes by re-designing the on-line application process. **Result: Improved the efficiency of the graduate business office's processing of MBA applications.**
- Redesigned Niagara University's Mission web site. **Result: Improved the manner in which the Vincentian mission at Niagara University was communicated to the public and current and prospective students.**

#### **Citi Group Canada, Senior Account Associate (2001-2002)**

- Supervised day-to-day activities of Sales and Retention Associates. **Result: Learned appropriate methods of effectively planning, organizing, leading and controlling staff.**
- Designed quality control system to improve commission sales analysis and controls. Analyzed commission results and provided monthly reporting to management. **Result: Improved internal control of commission payments to staff.**
- Coached staff on improving sales and service skills. **Result: Improved staff training and morale.**

#### **Royal Bank Financial Group**

##### **Account Manager, Business Banking (1999-2001)**

- Negotiated business financing while providing outstanding customer service. **Result: Exceeded sales and profitability targets by 22%. Awarded Royal Service Award.**



**Account Manager, Personal Banking (1995-1999)**

- Negotiated personal credit financing and advised clients regarding investment strategies on portfolios of up to \$500,000. Managed lending limits of up to \$300,000. **Result: Consistently exceeded sales and service targets resulting in significant promotion to a role in business banking.**

**TD Canada Trust, Easyline and Branch Telephone Support (1989-1995)**

- Sales of a variety of products to customers. **Result: Consistently maintained position within top 15% of approximately 40 employees.**
- Promoted to Supervisor and provided day-to-day supervision of up to 10 staff. **Result: Contributed to the success of the organization including morale and sales and service targets.**

**Awards and Honors**

- Niagara University Graduate Scholarship
- Niagara University Graduate Business Student of the Year (2004)
- Inducted into the University's Kappa Gamma Pi Honors Society (2004)
- New York State Society of CPA's (Buffalo Chapter) Award for Distinction in Graduate Accounting Studies