Dave Makarchuk

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3807, 80 John Street, Toronto, ON , M5V 3X4 | 416.996.1175

Education

BACHELOR OF COMMERCE, BACHELOR OF ACTUARIAL SCIENCE
1992 | UNIVERSITY OF CALGARY

- Major: Finance

FELLOW OF THE SOCIETY OF ACTUARIES, 1999
FELLOW OF THE CANADIAN INSTITUTE OF ACTUARIES, 1999
CHARTERED FINANCIAL ANALYST CHARTERHOLDER, 2008

Experience

SALES AND STRATEGIC GROWTH LEADER – CANADIAN WEALTH BUSINESS | MERCER
JANUARY 2017- PRESENT

- Partnering with Mercer Canada's National Wealth Leadership team, I am responsible for driving profitable growth across Mercer Canada's spectrum of Wealth solutions.

INVESTMENT/WEALTH BUSINESS LEADER – TORONTO | MERCER
SEPTEMBER 2016-AUGUST 2017

- As a member of Mercer Canada’s National Investment/Wealth Leadership team, I was responsible for leading our Toronto Investment/Wealth business. Management responsibilities included people leadership (50-130 people), operational efficiencies, sales growth, and overall profitability.

INVESTMENT BUSINESS LEADER – WESTERN CANADA | MERCER
JANUARY 2006-SEPTEMBER 2016

- As a member of Mercer Canada’s National Investment Leadership team, I was responsible for leading our Western Canadian investment business. Management responsibilities included people leadership (10 people), operational efficiencies, sales growth, and overall profitability.

RETIREMENT BUSINESS LEADER – CALGARY | MERCER
JANUARY 2003-DECEMBER 2005

- As a member of Mercer Canada’s National Retirement Leadership team, I was responsible for leading our retirement business in Calgary. Management responsibilities included people leadership (30 people), operational efficiencies, sales growth, and overall profitability.

INVESTMENT CONSULTANT – CALGARY/TORONTO| MERCER
JANUARY 2006-PRESENT

I lever my investment and actuarial background to advise institutional plan sponsors regarding a variety of strategic issues regarding their pension plans and other institutional assets. I advise sponsors of both defined benefit and defined contribution pension plans as well as a variety of non-pension institutional funds, with a focus on plans with assets in excess of $1Billion. I lever the breadth and depth of Mercer's intellectual capital to effectively work with boards and committees to help them identify and achieve their investment objectives.

RETIREMENT CONSULTANT – CALGARY| MERCER
DECEMBER 1999 -DECEMBER 2007

I levered my actuarial background to provide design, valuation, and other related advice to sponsors of defined benefit pension plans.

RETIREMENT CONSULTANT – CALGARY| WATSON WYATT
AUGUST 1997 -DECEMBER 1999

I levered my actuarial background to provide design, valuation, and other related advice to sponsors of defined benefit pension plans.

ACTUARIAL ANALYST – REGINA| CROWN LIFE INSURANCE COMPANY
MARCH 1993 – AUGUST 1997

I levered my actuarial background to provide valuation, pricing, design, and other services to Crown Life’s pension and corporate actuarial divisions. I was the youngest plan level manager at the company.

David (Dave) Makarchuk, *CFA, FSA, FCIA*

Partner & Senior Investment Consultant, Mercer Canada

As a member of Mercer Canada's National Wealth Leadership team, I am responsible for driving client success across Mercer Canada's spectrum of Wealth solutions. We do this by collaborating with our clients to help them make better Saving decisions, better Administration decisions, better Investment decisions, and better Delivery decisions. In addition to leading our strategic growth initiatives, I consult to a select group of clients to help improve the Wealth of their employees and/or institutional funds by improving Returns, optimizing Risk, managing Costs and making better use of Time.

More specifically, I lever my investment and actuarial background to advise institutional plan sponsors across a variety of strategic issues. I advise sponsors of both defined benefit and defined contribution pension plans as well as a variety of non-pension institutional funds, with a focus on plans with assets in excess of $1Billion. I lever the breadth and depth of Mercer's intellectual capital to effectively work with boards and committees to help them identify and achieve their investment objectives.

I am a CFA Charterholder (2008), a Fellow of the Canadian Institute of Actuaries (1999), and a Fellow of the Society of Actuaries (1999). I graduated from the University of Calgary in 1992 with a Bachelor of Commerce (Finance) and Bachelor of Science (Actuarial Science).

Prior to joining Mercer in 1999, I consulted with Watson Wyatt. From 1993-1997, I provided actuarial services to Crown Life Insurance Company.