



Keith Sjögren

Keith Sjögren is the Managing Director, Consulting at Strategic Insight (formerly Investor Economics), a provider of research and advisory services to the financial services industry in Canada. In his role as Managing Director, Consulting, Keith is responsible for identifying and leading consulting engagements with a wide range of financial institutions and businesses, including major banks, insurance companies and asset managers.

Prior to joining Investor Economics in 2006, Keith was the Leader of the Wealth Management practice at The Taddingstone Consulting Group. Before joining Taddingstone in 1995, Keith held a number of executive positions at CIBC including Senior Vice President, Private Banking & Trust. His career spans retail banking, wealth management and international banking. He has lived and worked in the United States, Iran, the United Kingdom and Singapore.

Keith was educated at Carleton University, Ottawa and the University of Toronto. He is a Fellow of the Institute of Canadian Bankers and holds the Partners, Directors and Officers qualification of the Canadian Securities Institute.

Keith is the author of a number of major reports on issues such as the transfer of wealth; women and wealth, as well as three reports on the issue of women and philanthropy. He is a frequent speaker at wealth management conferences and has also spoken at major conferences dealing with philanthropy and the charitable sector. Keith is currently working on a report dealing with donor-advised funds in Canada.

Keith is the Chair of the Advisory Committee to the Masters Program in Philanthropy and Nonprofit Leadership. He is also a member of the Investment Committee of the Centre for Addiction and Mental Health Foundation and a special committee of the Portfolio Management Association of Canada that selects an annual winner of an award for excellence in investment journalism. Keith is also a member of the Executive Committee of the Emeritus Counsel of the Canadian Opera Company.