

Jacques Lussier Receives a Prestigious Award

Montreal, October 4, 2018 – The IPSOL Capital team is proud to announce that Jacques Lussier, PhD, CFA, Honorary President of CFA Montreal and Chief Investment Officer of IPSOL Capital, has been chosen as the recipient of the C. Stewart Sheppard Award for his “Outstanding Contribution to CFA Institute Education Programs.” The award was established to honour a CFA charterholder for his or her outstanding contributions to the professional development of investment professionals. Jacques Lussier joins a group of prestigious past laureates, including Charles D. Ellis, Frank J. Fabozzi, Donald L. Tuttle and John Maginn.

A passion for sharing

This honour pays tribute to Jacques Lussier's desire to share his knowledge, increase the financial literacy of investors and advance expertise in asset management. This year, more than 35,500 professionals studied his text *Active Equity Investing: Portfolio Construction*, cowritten with Marc Reinganum and distributed to all CFA Level-3 candidates. It is now a staple on the program's curriculum.

As the person responsible for the CFA Society Montreal's educational content, Jacques organized the lecture given by Ben Bernanke in Montreal in 2014 to the delight of more than 1,200 guests, the largest conference audience in the Association's history. He is also the editor of “Portfolio Structuring and the Value of Forecasting,” the second-most downloaded research paper in the history of the CFA Institute.

Financial knowledge for all

Jacques has also prepared educational material for non-professional (or retail) investors. He is the author of 31 short papers entitled “Investment principals and financial planning,” published in partnership with CFA Montreal and CFA Institute, to assist investment advisors and non-professional investors. These short factsheets, distributed across Canada, were made available by *La Presse +, Finance et Investissement* and the Government of Canada.

Beyond his involvement with CFA Institute and CFA Montreal, Jacques demonstrates his desire to further the knowledge of finance and investment professionals in many ways. In the 1990s, as a professor at HEC Montréal, he contributed to the financial training of many future professionals. He is also the author of *Successful Investing is a Process* (Bloomberg-Wiley) and co-author of *Rational Investing* (Columbia

University Press), both of which have been acclaimed by professional investors.

In his efforts to provide concrete solutions to the problem of savings and decumulation for retail investors, Jacques will publish in 2019 a third book entitled *Secure Retirement – Integrating Finance Science and Behavior*, which aims to guide individual investors and finance industry professionals through the many facets of personal financial planning.

“Jacques is an important player in the acquisition of collective knowledge and the constant advancement of investment professionals’ skills,” said Sylvain Roy, Chief Executive Officer of IPSOL Capital. “It is a privilege to be able to work with him on a daily basis and to share his expertise with our clients.”

About IPSOL CAPITAL

IPSOL CAPITAL Efficient Portfolio Solutions provides institutional and individual investors with investment and advisory solutions, with strategies spanning all asset classes, industries and geographies.

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