

Blu Sparks Presents:



Paul K. Bates

Latest Speaking Topics

Business & Management

- Planning and goal setting
- Activities management
- Staffing and team building
- Coaching and development
- Reward and recognition
- Relationship building
- Long-range vision planning
- Purpose-driven business

Leadership & Culture

- Creating a culture of innovation
- From customer service to customer enthrallment
- Business creation as community changing
- How leaders communicate
- Why is change difficult?
- Unpacking the challenges of leadership today



Prof. Paul K. Bates, M.T.S., FCPA, FCMA, CMC, Ph.D. (in course).

Paul's career has spanned senior academic administration, business school lecturing, investor advocacy, capital markets regulation, corporate and not-for-profit governance (public & private), investment dealer executive leadership with P&L accountability, expert witness and international consulting in the financial services sector, and executive coaching and advisory services. He has been a director on over twenty corporate, regulatory and non-profit boards.

Paul is a Chartered Professional Accountant (FCPA), Fellow of the Society of Management Accountants (FCMA) and Certified Management Consultant (CMC). He also holds a Master's Degree in Theological Studies and is currently pursuing a Ph.D.

He is currently serving as **Assistant Professor of Leadership** and Advancement Advisor at **McMaster Divinity College**. This follows two years as Special Advisor to the President of the University, and following almost seven years as Dean at the DeGroote School of Business. During his Deanship, the School received initial accreditation and renewal by AACSB – the Association to Advance Collegiate Schools of Business, developed four new master's degree programs (the first new degrees in 25 years!), almost tripled enrolment in the MBA program and tripled enrolment in doctoral studies.

As a former Adjunct Professor at the University of Toronto's Rotman School of Management, he was awarded an Outstanding Teacher Award in 2003 and again in 2004. Paul recently completed a second edition of his best-selling book, *Sales Force Management in the Financial Services*. His new book, *What I Have Learned So Far and How It Can Help You*, co-authored with Al Emid, is also a best-seller. Both books have made it to the GlobeAdvisor top ten books for business list.

Following service on the boards of the Toronto Stock Exchange and the Canadian Investment Dealers Association, in 2003 Paul was appointed as a part-time commissioner to the Ontario Securities Commission (OSC); he completed his second and final term on June 10th, 2009. He also chaired the Investor Education Fund and served as a member of the OSC's Investor Advisory Panel. Paul is Chair of the Board of Verity International in Toronto and is a member of the Royal Bank's Global Asset Management Board of Governors. He serves as a Director of Evangel Hall Mission in Toronto and is a board member at Liberty for Youth in Hamilton, Ontario.

Paul has held the president's office at four major brokerage and investment firms, including Marathon Brokerage, TD Greenline, and Charles Schwab Canada (later acquired by Bank of Nova Scotia). His experience includes executive management in established firms and also successful "de novo" start-ups.



In 2000, Investment Executive Magazine selected Paul as the Most Influential Broker of the Year by. In 2002, he was awarded the Queen's Jubilee Medal for community service.

In January 2008, Paul was appointed to a three-year term to the Social Sciences and Humanities Research Council of Canada (SSHRC). He completed his second term in February 2014, having also served as chair of SSHRC's Program and Quality Committee.

Paul is very involved with his church, where he is a member of the worship team. A highly rated instructor, Paul is appreciated as a speaker in the areas of leadership, ethics, financial management and entrepreneurship.

For speaker fee information and to book Paul for your event, please contact Rachel Formaro: rachel@blupagoda.com, 515-285-2511 or 415-794-0484.