CAUFP

CANADIAN ASSOCIATION OF URBAN FINANCIAL PROFESSIONALS

ANNUAL REPORT

2026

Advancing Black professionals in Canada’s financial services industry

CONTENTS

CAUFP
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Who We Are p.3



President's Message p.4



2026 Executive Board p.6



2026 Achievements p.7



Professional Development p.18



Event Highlights p.28



Voices of Impact - Testimonials p.29



Corporate Partners p.30

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WHO WE ARE

CAUFP
CANADIAN ASSOCIATION OF URBAN FINANCIAL PROFESSIONALS

The Canadian Association of Urban Financial Professionals (CAUFP) is a leading member-based association that advances Black professionals and promotes diversity in financial services by linking corporations and community organizations with the Black community through programs that drive economic growth, education, and professional development, including networking and mentorship.

Our Vision

We aim to be a driving force for the empowerment, representation, and advancement of Black professionals at all levels and skill sets within Canada's financial services industry

Our Mission

To develop and advance Black professionals by:

- Partnering with organizations to strengthen a pipeline of Black talent
- Investing in professional development and strategic networking opportunities for our members
- Providing the tools and support needed to help them reach their full potential and enhance the financial services industry

Our Core Values

Inclusive **COMMUNITY** of Black professionals

SUPPORT and **INSPIRE** each other with advice, resources, and opportunities

Commitment to **EXCELLENCE** in everything we do

2026: HIGHLIGHTS

5
Corporate Partners

80+
New Members

20+
Keynote Speakers

500+
Program Participants

PRESIDENT'S MESSAGE

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Jummie Barry-Roberts, MMIE

Building on Our Legacy, Shaping Our Future

As I reflect on 2026, I am reminded that the true measure of an organization is not only what it accomplishes, but the opportunities it creates and the lives it impacts.

One of my priorities as President has been to ensure that CAUFP continues to deliver meaningful value through the connections we facilitate, the opportunities we create and the professional journeys we help shape. Our purpose remains clear: to advance Black professionals, strengthen representation across Canada's financial services industry, and create pathways for individuals to develop, lead and thrive.

This year, we welcomed 83 new members, bringing our active membership to 266 and our extended network to more than 2,200. Through 12 events, we recorded over 500 attendee check-ins, bringing together professionals, emerging leaders, executives and industry partners to connect, learn and grow.

Our corporate and community partnerships were central to this progress. Together with RBC Capital Markets, CIBC, Scotiabank, CPA Ontario, EY, Matrix360, Verity and others, we delivered opportunities for professional development, industry engagement and access to corporate leaders and recruiters.

From our Economic Outlook and AI in Financial Services discussions to the CSPRK Summit: Blueprints for Tomorrow, we continued to bring our community into important conversations shaping the future of our industry.

We also invested in the next generation of talent through initiatives such as the Next Level Mentorship Program, which brought together 33 mentees and six mentors across six sessions, alongside our Career & Leadership Series, university partnerships and scholarship initiatives.

PRESIDENT'S MESSAGE



Jummie Barry-Roberts, MMIE

This progress would not be possible without the dedication of our Board, portfolio leaders and more than 40 volunteers, whose time, expertise and commitment bring our vision to life.

To our corporate and community partners, thank you for continuing to invest in our community.

To our members, thank you for showing up, sharing your experiences and helping make CAUFP a place where people can find connection, guidance and opportunity.

As we look ahead, 2027 marks a significant milestone: CAUFP's 30th anniversary! Thirty years represents more than longevity, It reflects the dedication of those who built this organization, the partners and professionals who have sustained it, and the generations who have benefited from the doors it has helped open.

For me, this milestone is about more than celebrating how far we have come. It is about building on that foundation, deepening our impact and ensuring CAUFP remains relevant to the evolving needs and ambitions of the next generation.

I envision an organization where a student can discover a new career possibility, a professional can find guidance for their next move, a leader can make a meaningful contribution, and a partner can see the tangible value of investing in talent and opportunity.

That is the legacy we must continue to build together.

Thank you for being part of this journey. I look forward to all that lies ahead as we enter this next chapter.

With gratitude,

Jummie Barry-Roberts, MMIE
President, CAUFP

2026 EXECUTIVE BOARD

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Jummie Barry-Roberts
President



Tobi Okeniyi
Corporate Secretary



Robert Belle
VP Finance



Nosa Atoe
VP Talent Acquisition



Romero Newell
VP Membership



Elaine Yan
VP Corporate Partnerships



Charles Umeh
VP Volunteer Experience



Hannah Abayneh
VP Western Chapter Development



Kehinde Olawoye
VP Financial Literacy



Laureen Adjetey-Saboka
VP Community Partnerships



Troy Peart
BC Chapter Lead



Ebenezer Kwakye
VP Marketing & Communications

2026 ACHIEVEMENTS

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Corporate Partnerships

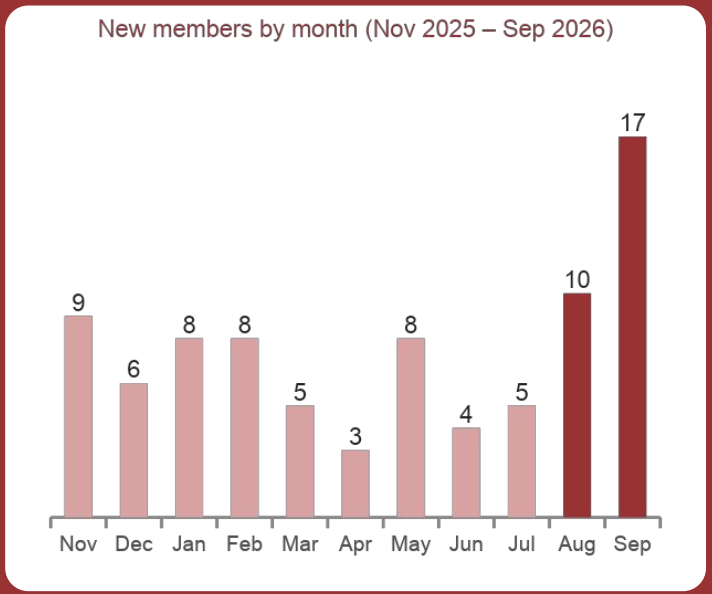
CIBC | RBC Capital Markets | Scotiabank | CPA Chartered Professional Accountants Ontario

Membership

83
New members joined

266
Active members

68.5%
Retention rate
17 new members in September was the high of the year.



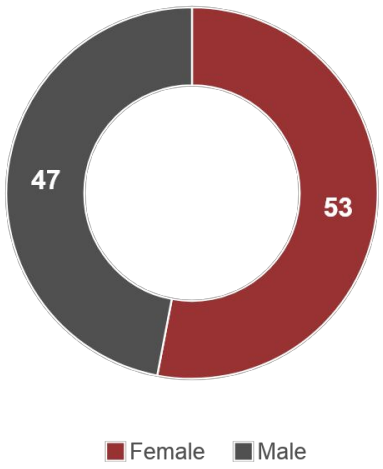
MEMBERSHIP PROFILE

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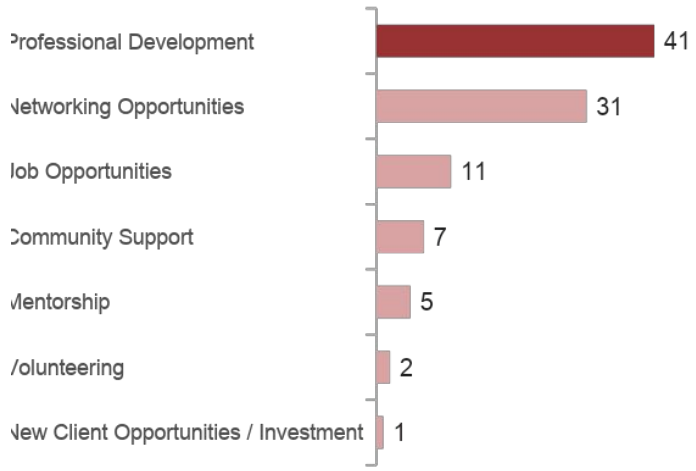
Extended network, data as of November 5, 2026

2,298	266	11.5%	90%
Extended network	Active members	Active share of network	Open to recruiters

Gender (2,237 answered)



Primary reason for joining (807 answered)



A talent pipeline in waiting

90% of members are open to hearing from recruiters, a strong base for our Talent Acquisition work.

Growth and career come first

41% joined for professional development and 31% for networking, 72% combined.

A balanced community

The network is 53% female and 47% male across the 2,237 members who answered.

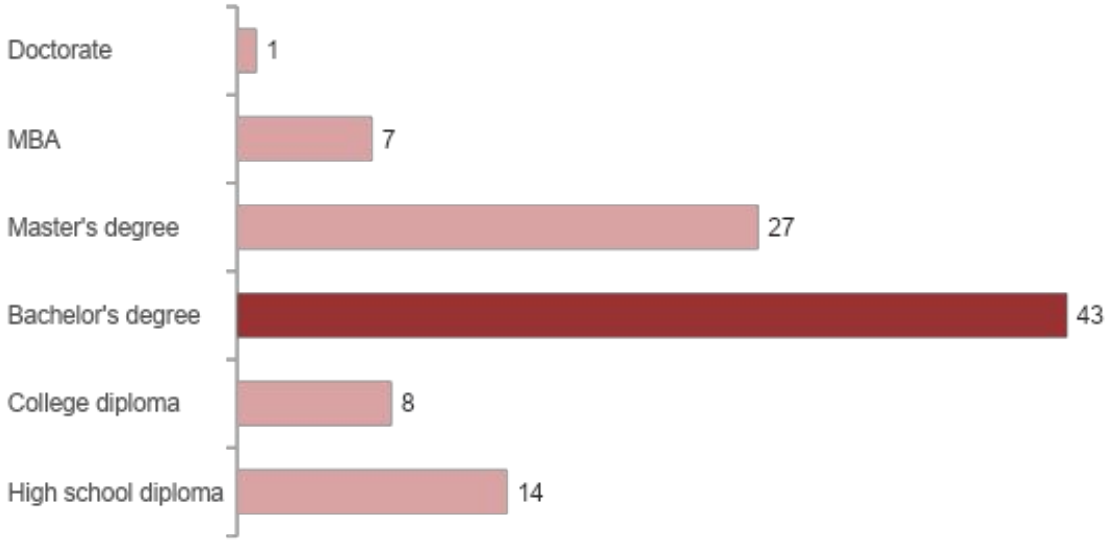
Shares are of members who answered each question and are rounded. Extended network = every membership record (active, expired, cancelled, prospective). Source: CAUFP membership export.

EDUCATION & EXPERIENCE

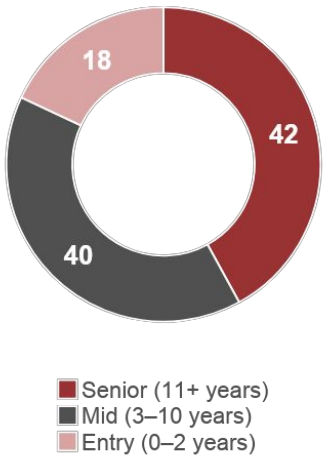
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Extended network, data as of November 5, 2026

Highest degree (1,475 answered)



Professional experience (1,338 answered)



Summary

78% hold a bachelor's degree or higher, and 35% hold a master's, MBA or doctorate.

82% are mid-level or senior professionals with three or more years of experience.

42% are senior, with 11+ years in the field.

A seasoned network. With 42% senior members and 18% at entry level, CAUFP has a natural base of mentors for early-career talent.

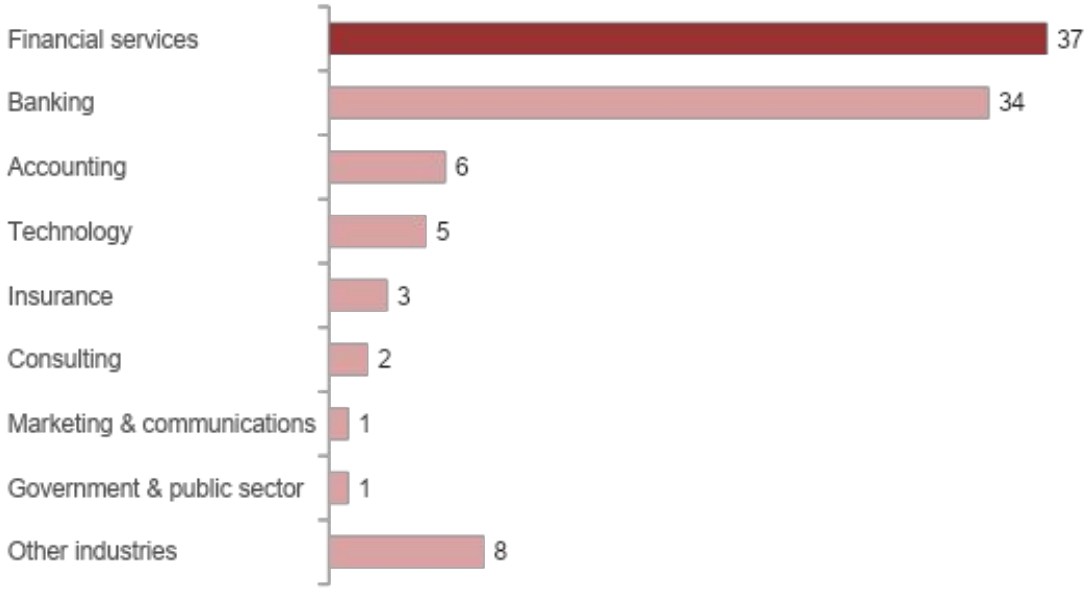
Shares are of members who answered each question and are rounded. Source: CAUFP membership export.

INDUSTRY & REACH

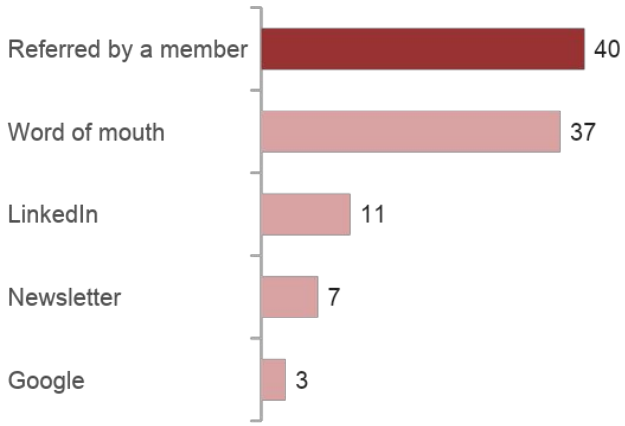
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Extended network, data as of November 5, 2026

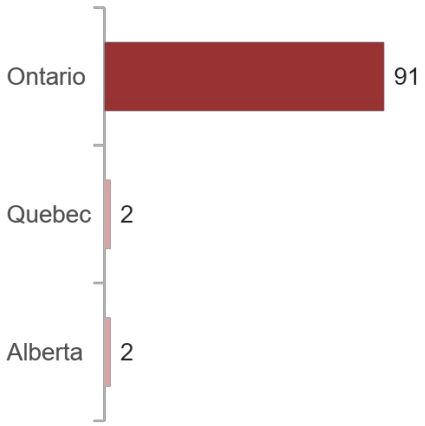
Industry (1,306 named an industry)



How they heard about us



Where they live



71%
work in financial services or banking

77%
found CAUFP through a member referral or word of mouth

91%
are based in Ontario

Industries are grouped (for example, Banking includes retail and investment banking). Shares are rounded. Source: CAUFP membership export.

2026 ACHIEVEMENTS

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Finance

- Completed taxes and regulatory requirements
- Monthly financial reports now delivered within two weeks of month-end close
- Payment controls strengthened: separation of duties, dual EFT signing, independent review of bank reconciliations, and treasurer oversight of senior management expenses

Community Partnerships

Renewed partnership with Matrix360
Re-established our in-kind partnership to launch the Career & Leadership Series.

Programs
Black Leadership in Canadian Financial Planning, Whiteboard Collective Micro-Credential, Next Level Mentorship Program.

Scholarships
Dentons-CAUFP Scholarship.

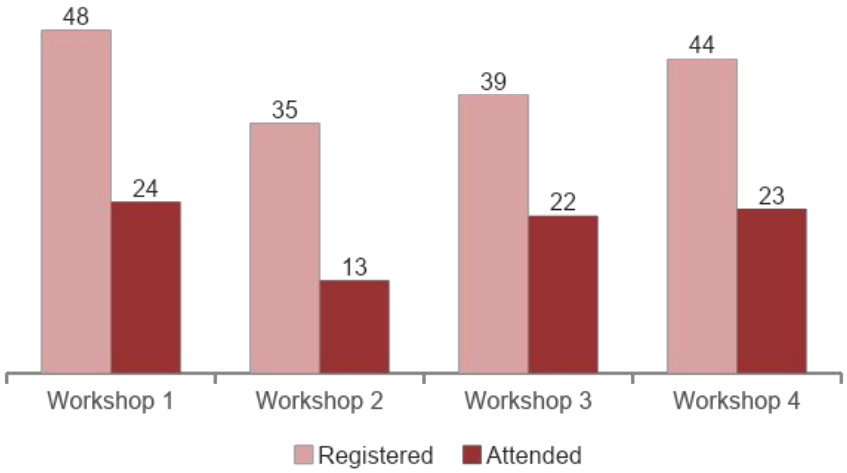
Expanded University partnerships
Two new partnerships: Rotman African and Caribbean Business Club (RACBC) and Maisha Canada.

COMMUNITY IMPACT

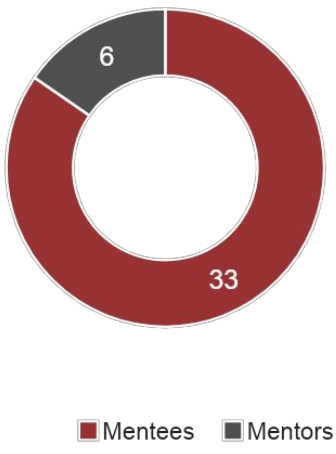
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39	6	4	82
Mentors and mentees in Next Level	Next Level sessions, Sep–Oct	Career & Leadership workshops	Workshop attendees checked in

Matrix360 Career & Leadership Series



Next Level Mentorship



2026 ACHIEVEMENTS

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Financial Literacy

Podcast episodes launched

New episodes on financial topics for our community.

Financial Literacy Tuesdays

A social media series on Life Insurance and Wealth Management.

Marketing & Communications

620

new LinkedIn and Instagram followers, Jan–Sep

8.33%

average LinkedIn engagement rate (6.43% in January)

20.2%

newsletter open rate, up from 20.0% in 2025

0.94%

newsletter click rate, down from 1.31% in 2025

2026 ACHIEVEMENTS

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13

Volunteer Experience

new volunteers onboarded to strengthen teams across CAUFP portfolios

Relaunched the CAUFP Insider

The internal volunteer newsletter, to strengthen communication and engagement.

Launched the Volunteer Spotlight

A monthly feature recognizing volunteer contributions and achievements.

Redefined application requirements

Better aligning applicants' skills, education, experience, and qualifications with suitable roles.

Supported Programming events

Volunteer onboarding and coordination for CAUFP events.

Implemented volunteer performance reviews

Tracking participation, engagement, and accountability across volunteer teams.

2026 ACHIEVEMENTS

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Governance

100%

Regulatory deadlines met

Strengthened governance framework: managed password changes and board activities in line with the by-laws
Maintained transparency: updated the Elections page and requirements
Supported strategic initiatives

Talent Acquisition

12

referral callouts across RBC, TD and Odgers

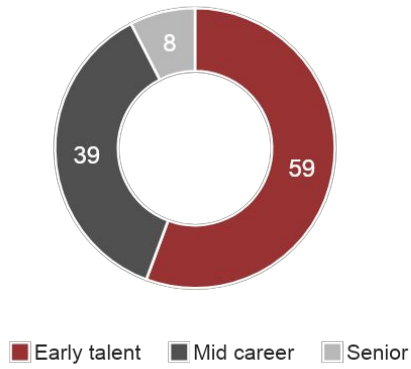
5–8

candidates shared per callout

$3,000

invested in the new talent portfolio, launched to partners in Q3

106 profiles submitted, by career stage



Diversification outreach: EY, Deloitte, MLSE (Q1–Q3)
Program pilots: Scotiabank AI in Recruitment Workshop, Resume Workshop

PROGRAMMING IMPACT

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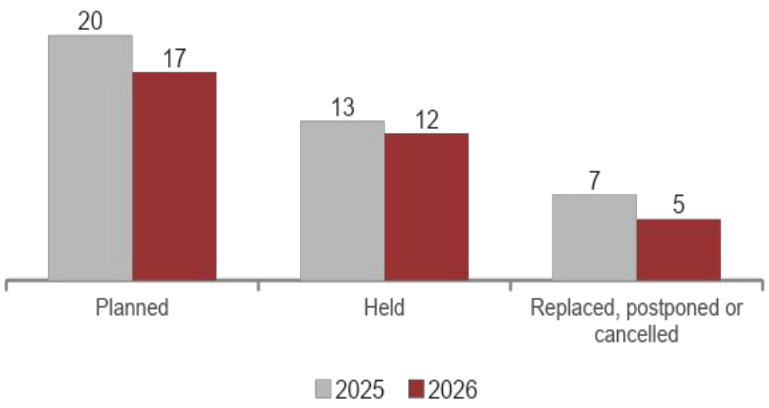
12 events held (17 planned)

1,081 registrations

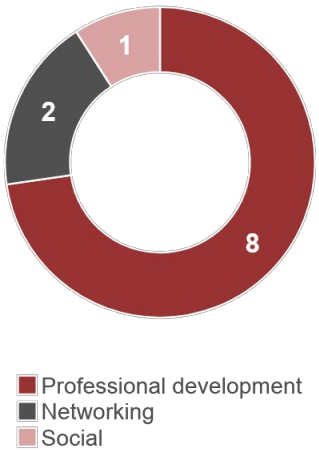
588 attendees checked in

4.74 average rating out of 5

Events: 2025 vs. 2026



Events held by type



70.6%

completion rate (held of planned), vs. 65% in 2025

54.4%

overall show-up: 49% professional development, 72% networking, 89% social

93

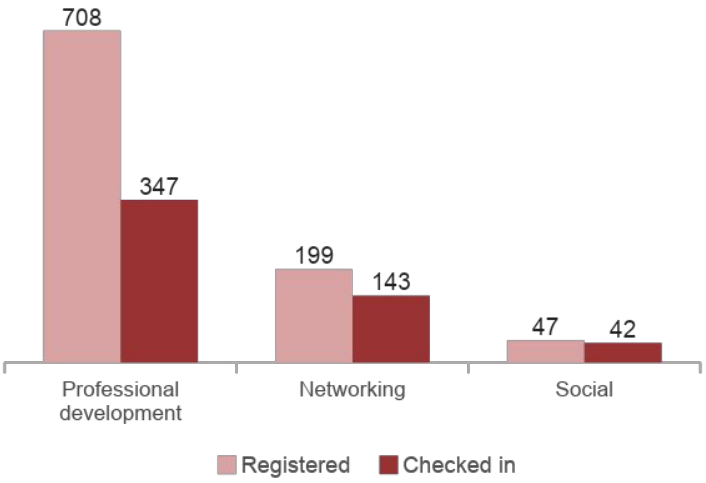
survey responses (15.8% response rate); event ratings from 3.75 to 5.0

The year in programming. CAUFP delivered 12 events against 17 planned, in line with last year's completion rate, with 5 replaced, postponed or cancelled and 1 still upcoming. Professional development remained the core at 8 of 11 events, while networking grew from none in 2025 to two events. Ratings are directional because survey samples are small.

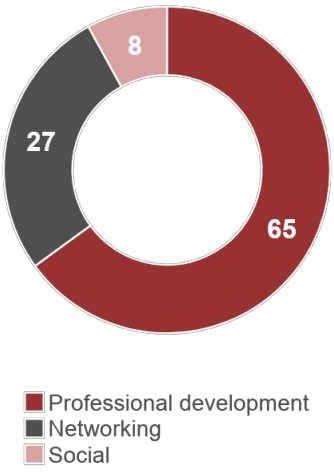
TYPE & PARTNER

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Registrations and attendees by type



Share of attendees

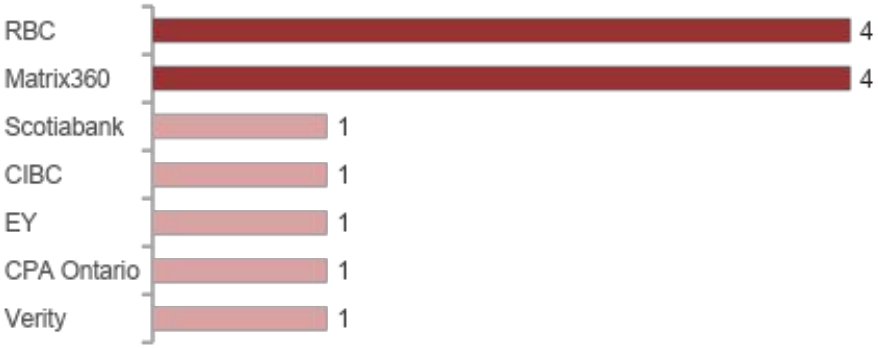


49%
professional development show-up rate

72%
networking show-up rate

89%
social show-up rate

Events by partner



RBC: Economic Outlook, two professional development events and the CSPRK Summit. **Matrix360:** four Career & Leadership workshops. **Scotiabank:** internal event. **CIBC and CPA Ontario:** CSPRK Summit. **EY and Verity:** networking events.

PROFESSIONAL DEVELOPMENT

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CAUFP is committed to inspiring and developing today's leaders. As such, we host professional development workshops and seminars to equip our members with the knowledge and skills they need to navigate career changes.



12
events held

1,081
registrations

588
attendees checked in

4.74
average rating out of 5

Throughout our careers we can easily overlook the critical skills and competencies required to successfully progress to the next level as leaders.

In response, CAUFP, in partnership with Matrix360, has developed and delivers a progressive, experiential, and impactful program that guides professionals to positive behavioural change, leading to enhanced leadership skills and opportunities.

Workshop initiatives available

- Careers+ (soft skill development workshops)
- Leadership Advancement Workshops
- Leadership Speaker Series
- Next Level Mentorship Program

For more information, visit:
caufp.ca/programs/professional-development

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Career & Leadership Development Series: Workshop 1-4

April – August 2026 | In partnership with Matrix360

The first workshop in the Career & Leadership Development Series focused on interviews and resumes, giving members practical tools to present themselves with confidence. The series is delivered with in-kind partner Matrix360 and uses experiential learning to guide professionals toward stronger leadership skills and opportunities.

The second workshop in the Career & Leadership Development Series, delivered with Matrix360. Each session builds practical career and leadership skills through hands-on, experiential learning.

The third workshop in the Career & Leadership Development Series, delivered with Matrix360 to keep building members' career and leadership skills through experiential learning

The fourth and final workshop closed out the Career & Leadership Development Series, delivered with Matrix360 across four sessions from April to August.

SUCCESS FACTORS

82	3.75 / 5	4.0 / 5	100%
Attendees	Overall rating (4 responses)	Expectations met	Would recommend

CAUFP 2026 Economic Outlook Event

April 2026 | In Partnership With RBC Capital Markets

An evening of discussion on Canada's 2026 economic outlook, exploring inflation, interest rates, housing and global impact. Hosted with RBC, it gave members a grounded view of the economy to inform their careers and decisions.







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CAUFP x RBC: AI in Financial Services, Beyond the Headlines

July 2026 | With RBC Capital Markets

A panel presented with RBC Capital Markets that cut through the noise on how AI is reshaping financial services: how it is being used, what is working, what is still uncertain, and what ambitious talent should do now to stay ahead. Members across Western Canada could join virtually.







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CAUFP Garden Party: Boardroom to Patio

July 2026 | Toronto | Hosted by CAUFP

An invitation to all female professionals to step out of the boardroom for light refreshments, hors d'oeuvres and beautiful conversations.







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CAUFP x EY Networking Social

July 2026 | With EY

An energizing evening that put members in a room with senior executives, high-performing professionals and rising talent across financial services. Guests came to grow their network, gain diverse industry perspectives and elevate their personal brand alongside a community committed to leadership and inclusion.







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Scotiabank Thought Leadership Speaker Series (Virtual Event)

August 2026 | Internal event for Scotiabank | With Scotiabank

A Thought Leadership Speaker Series session hosted as an internal event for the Scotiabank team, in partnership with CAUFP.

SUCCESS FACTORS

94
Attendees

Internal
Session for the Scotiabank team

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CSPRK SUMMIT

September 2026 | In Partnership with CIBC, RBC Capital Markets, TD and CPA Ontario

A full-day professional development Summit, supported by CIBC, RBC, TD and CPA Ontario. Featuring keynotes, a career fair, resume reviews, complimentary professional headshots and breakout sessions about career options in finance, the event connects underserved professionals with recruiters and industry leaders to support career development. See the detailed CSPRK Summit Impact report here













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CAUFP x Verity: The Relationships That Shape Us

November 2026 | With Verity

An invitation-only evening of cocktails, familiar faces and meaningful conversation for female leaders and executives, built around a panel on how our relationships shape our careers: the people who influence our journeys, challenge our thinking and champion our success.







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CAUFP x RBC: Beyond the Desk: Engagement that Drives Careers

November 2026 | With RBC Capital Markets

A fireside chat with RBC Capital Markets on why ERGs, industry associations and community boards are part of the job: your network is a business asset that turns connections into relationships and shapes where your career goes next.







EVENT HIGHLIGHTS

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Eleven events held in 2026

12	588	4.74 / 5
events held	attendees checked in	average event rating

		ATTENDEES	RATING
APR	**Career & Leadership Series: Workshop 1** Matrix360 | Professional development	24	3.75
APR	**CAUFP Economic Outlook Event** RBC | Professional development	41	4.43
JUN	**Career & Leadership Series: Workshop 2** Matrix360 | Professional development	13	5.0
JUL	**AI in Financial Services: Beyond the Headlines** RBC Capital Markets | Professional development	43	4.75
JUL	**CAUFP Garden Party: Boardroom to Patio** CAUFP | Social	42	4.6
JUL	**Career & Leadership Series: Workshop 3** Matrix360 | Professional development	22	5.0
JUL	**CAUFP x EY Networking Social** EY | Networking	88	5.0
AUG	**Career & Leadership Series: Workshop 4** Matrix360 | Professional development	23	5.0
AUG	**Scotiabank Thought Leadership Speaker Series** Scotiabank | Professional development	94	-
SEP	**CSPRK Summit: Blueprints for Tomorrow** CAUFP, CIBC, RBC Capital Markets, TD, CPA Ontario | Professional development	87	5.0
NOV	**CAUFP x Verity Partnership Social** Verity | Networking	55	4.0
NOV	**CAUFP x RBC Capital Markets- Beyond the Desk** RBC | Professional development	56	4.5

VOICES OF IMPACT

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Testimonials

One of the things I valued most about Next Level was the opportunity to help make the career path feel a little less mysterious for someone coming behind me. I found the experience personally rewarding too. It gave me a chance to reflect on my own journey and learn from the mentees' perspectives. I especially appreciated the candid conversations about navigating ambiguity, stepping outside your comfort zone, recovering from setbacks, and staying true to who you are. It was rewarding to be part of conversations and connections that could help the mentees move forward with greater confidence and intention.

Yvette Bryan-Moses (Mentor)
NextLevel Mentorship Program (2026)

The Next Level Mentorship Program was really helpful, and I found the information shared during the sessions very insightful. The content was practical, and I've already started applying several of the frameworks to my current role. I've also kept in touch with my mentor since the program ended.

Ayotunde Afolabi
NextLevel Mentorship Program (2025)

Receiving the Dentons-CAUFP Scholarship has meant more than financial support. The Scholarship has directly provided me with financial relief. The renewable structure reinforces that Dentons and CAUFP are making a long-term investment in the students it supports.

Justice McKenzie
Dentons-CAUFP Scholarship recipient (2025)

CORPORATE PARTNERS

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CAUFP's partners are committed to increasing the number of Black professionals in their companies and advancing Black professionals into leadership roles. Our partners recognize the strengths that diversity and inclusion bring to their organizations and are committed to driving diversity and inclusion changes in the industry.

Our success in 2026 would not be possible without the support of these generous corporate partners.

GOLD PARTNER

CIBC

SILVER PARTNERS

RBC Capital Markets

Scotiabank

BRONZE PARTNERS

FASKEN

CPA Chartered Professional Accountants Ontario

DENTONS

EDUCATION PARTNER

Matrix 360

UNIVERSITY PARTNERS

BGBN Black Graduate Business Network

BBSA York U

R

Maisha Canada Est. 2020 Learn and Grow

THANK YOU

to our members, volunteers, partners and community.

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