

FOUNDERS



Paul Allard, CFA

Paul brings 20 years of investment management experience to the KAI Asset Management team. Having worked as a portfolio manager both in Canada and overseas, he has developed an extensive skill set and brings a global perspective.

Paul began his investment management career in the late 1990s working for one of Canada's largest financial services firms. He focused on gaining knowledge and experience required to grow an asset management firm.

From 2005 to 2010, Paul acquired international experience in Sydney, Australia, in a number of portfolio management roles across a multitude of asset classes.

Paul returned to Canada with a young family and an opportunity to join a Canadian-based Portfolio Management firm as Senior Vice-President and Portfolio Manager. He joined the firm at a time where it required substantial expertise in building its investment services and operations capability.

Paul completed his Bachelor of Arts (History) at the University of Manitoba in 1999 and received the Chartered Financial Analyst (CFA) designation in 2005.



Robert MacKay, CFA

With over 10 years of experience in corporate finance and investments, Robert's hands-on experience in financial analysis and execution of private equity transactions is invaluable to the KAI team.

Robert entered the financial services industry in 2007 and quickly found his niche working with business owners. Specifically, Robert developed expertise in the areas of investments, insurance, and financial analysis.

During his tenure providing financial advisory services, he was increasingly sought out by private clients to provide corporate finance consultation. These roles included asset valuations, joint venture structuring, and private capital raises.

Robert eventually joined a portfolio management firm where his skills and experience were instrumental in creating new financial product and marketing initiatives, which aided the company's continued growth of assets under management.

Robert completed his Bachelor of Commerce (Finance), Honours with Distinction from the I.H. Asper School of Business at the University of Manitoba in 2008 and received the Chartered Financial Analyst (CFA) designation in 2013.