

## Mark S. Bonham

5D – 20 Prince Arthur Avenue  
Toronto, ON M5R 1B1  
647-302-5267



[mark@marksbonham.ca](mailto:mark@marksbonham.ca)

[www.marksbonham.ca](http://www.marksbonham.ca)

Languages: English, French

### Profile

Experienced professional executive with extensive senior leadership history and success in the financial services, wealth management, consumer and philanthropic industries.

#### ***Financial Times of London (UK) OUTstanding Global Business Leader - 2017***

Experience includes private and public company management, mergers and acquisitions, going-public transactions, investment management, sales & marketing, finance and accounting, corporate finance and restructuring, large and small company administration, product development, manufacturing.

Both entrepreneurial and large company experience. Experience in identifying and integrating business opportunities. Expert in team building, financial management, and motivation. Results focussed.

### Business Experience

Nov 2020 to present

#### **Executive Director, The Veritas Foundation Toronto, Ontario**

- Manage the operations and granting process for this multi-faceted Registered Canadian Charity.
- Create and administer the foundation's Donor Advised Fund.
- Manage the charity's unique Charity Rating Service.

Jun 2002 to present

#### **President, Bonham & Co. Inc. Toronto, Ontario**

- Private holding company management and consulting.
- Investment portfolio of several active investments in diverse industries including: FinTech, Health Sciences, Consumer Products and Services, and Technology.
- Investment Portfolio advice to select high net worth clients.

Jan 2003 to Jun 2009

#### **Owner, Chairman & CEO, Stoney Ridge Estate Winery Vineland, Ontario**

- Managed a team of 25 individuals, including sales & marketing, administration, and production.
- Turnaround from a financially distressed situation to a profitable company.
- Completely renovated and remodelled this historic award-winning winery.
- Expanded the company's market by refining the product lineup and introducing new services. Rebranded the company as 'Niagara's Garden Winery' by creating seven themed gardens onsite with hospitality services.
- One of five finalists for Canadian Winery of the Year, International Wine & Spirits Competition 2007
- Sold position in company at a profit.

Sep 1995 to Jun 2002

**Founder, Chairman & CEO, Strategic Value Corporation  
("SVC"), Toronto, Ontario**

- Founded and built SVC into a TSX-listed investment management firm with C\$4 billion under management in 25 mutual funds with 200 employees.
- Extensive merger and acquisition experience, acquiring and integrating 4 fund management companies into SVC. Purchase transactions ranged from \$80 million to \$1.4 billion. Personally supervised all analytical work and regulatory approvals.
- Creation and management of a national sales team with multiple offices in strategic cities across Canada.
- Started as a private company, then took the company public on the Toronto Stock Exchange. Negotiated going-public transaction and financings valued at \$120 million.
- Portfolio Manager for the Dividend, Money Market, Canadian Balanced, and Global Balanced Funds with consistent first and second quartile performance records. Total assets of these funds were C\$700 million.
- Maintained consistent corporate profitability with growing ROE exceeding 15% each year.
- Chaired the Board of Directors as a public company.
- Sold the company to Quebec's pension fund, The Caisse de Depot.

Sep 1986 to Jun 1995

**Co-Founder, Chairman & CEO, BPI Financial Corporation  
("BPI"), Toronto, Ontario**

- Co-founded and built BPI into a TSX-listed investment management firm with C\$3.5 billion under management and 20 mutual funds with 150 employees.
- Extensive merger and acquisition experience, acquiring and integrating 9 fund management companies into BPI.
- Chaired the Board of Directors as a Toronto Stock Exchange listed company.
- Creation and management of a national sales team.
- Negotiated going-public transaction and financings aggregating \$800 million.
- Portfolio Manager for Canadian Opportunities Fund, Global Balanced Fund, and Canadian Balanced Fund with total assets of \$550 million and consistent first and second quartile performance.

Jun 1982 to Sep 1984

**Segregated Fund Specialist, Canada Life Assurance  
Company, Toronto, Ontario**

- Administered several Segregated Funds, including supervision of fund valuation, investment portfolio, purchase and redemption activity.
- Extensive management training program involving all aspects of investment management, including administration, equity, bond, and mortgage investment.

## **Education**

Sep 1984 – Jun 1986

London School of Economics, Masters of Science,  
Economics, specializing in Capital Markets Theory

Sep 1978 – May 1982

University of Toronto, Bachelor of Commerce

Sep 1985

Fellow of the Life Management Institute, Specializing in Life  
Insurance Investments

## Prominent Publications/Books

- *It's A Fabulous Morning! My Interviews with Fascinating People in the LGBTQ World*, 2019 (ISBN 9780993960056)
- *Trade-Offs: The History of Canada-U.S. Trade Negotiations*, 2019 (ISBN 9780993960048)
- Mark Carney, Governor of the Bank of Canada – A Biography, 2018 (in *The Governors of the Bank of Canada*, New Federation Press)
- *Becoming 150: 150 Years of Canadian Business History*, 2018 (ISBN 9780993960048)
- *A Path to Diversity: LGBTQ Participation in the Working World*, 2017 (ISBN 9780993960031)
- Contributing author – Financial Industry, *The Canadian Encyclopedia*, Historical Canada, 2016 to present
- *Notables: 101 Global LGBTQ People Who Changed the World*, 2015 (ISBN 9780993960024)
- *Champions: Biographies of Global LGBTQ Pioneers*, 2014 (ISBN 9780993960017))
- Forthcoming: *A History of the Canadian Financial Industry, 1900-present* (Completed and under Academic Review)

**Additional publications and research papers listed at [marksbonham.ca](http://marksbonham.ca)**

## Skills and Interests

- Extensive computer knowledge, including Microsoft Office, BusinessVision, AccPac/Simply Accounting, WordPress, WikiMedia, Movie Maker, and DesignPro
- Extensive published works in investment management and human rights, and media experience
- Master Gardener
- Competitive Cyclist, Tennis player

## Prominent Achievements

- Appointed to the Monument Advisory Committee of the LGBTQ2S+ Purge Fund (2019).
- Casey Award, 2019 – for visionary philanthropy to LGBTQ initiatives.
- Outstanding Philanthropist of the Year, 2018 – The Association of Fundraising Professionals
- OUTstanding Global Business Executive, 2017 - *Financial Times of London* (UK)
- Senior Fellow of Massey College, University of Toronto
- 2016 Clarkson Laureateship for Public Service
- Co-Chair Youth Homeless Shelter \$ 16 million Capital Campaign (2015-present, completed)
- Chair, Board of Directors; Chair, Finance and Audit Committee, Toronto Botanical Garden (2013-2018). Successfully negotiated City of Toronto approval for a \$50 million, ten-year expansion plan.
- Member, Capital Campaign, and Lead Donor, Casey House Hospice Expansion (2013 to present; \$52 million project completed)
- Co-Founder and Board member, Canadian Business History Association
- Inaugural Recipient, Alumni of Influence Award, 2012, University of Toronto
- Hope & Freedom Award, 2012 (for Charitable Activity)
- Benefactor, Bonham Centre for Finance, Rotman School of Management, University of Toronto. Bonham Scholarship, and Bonham Chairs in Finance
- Benefactor, Mark S. Bonham Centre for Sexual Diversity Studies, University of Toronto. Bonham Scholarship and Bonham Teaching Fellowship
- Ontario Sports Award, 2002 and 2003, contribution to Competitive Cycling
- Member, Group of 175: 175 Most Influential Graduates, University of Toronto

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