



2023 OPERATIONS DAY

Tuesday, May 30 | Toronto Region Board of Trade

Bill Charles, CFP
Chief Executive Officer
Global Maxfin Investments Inc.
Global Insurance Solutions Inc

Bill Charles is the Chief Executive Officer of Global Maxfin Investments Inc. and Global Insurance Solutions Inc. In this role, he is responsible for the overall leadership, direction, growth and profitability of the MFDA Dealership and MGA Business. He also acts as the UDP for the MFDA Dealer.



Bill assumed this role in May 2018 after 27 years with Investors Group. He started in the industry as an Advisor and quickly built up a large book of assets and insurance before moving to the Branch Manager role. As a Branch Manager, Bill built one of the fastest growing and most successful offices in Canada for 13 years. He, then, became Senior Vice President overseeing all aspects of Distribution, Sales, Asset Growth and 2000 Advisors in Ontario and Atlantic Canada.

He has also been a key note speaker on many different occasions; has spoken at the IFIC Annual Conference and the Investment Funds Forum regularly and has participated in the OSC round tables.

Bill served on the Board of Directors of the MFDA from 2011 to 2013. He is currently on the Board of The Investment Funds Institute of Canada (IFIC) and The Federation of Mutual Fund Dealers. He is a former member of the Board of Directors of the Brampton Rotary Club. Bill is also very active in many sports and coaching. He holds a BA (Finance & Economics) from the University of Western Ontario and is a Certified Financial Planner.