

The background of the entire page is a blue-tinted image featuring a stethoscope, several US dollar bills (including a \$100 bill with Benjamin Franklin's face), and a credit card. The ICIFA logo is positioned at the top center.

ICIFA 
INSTITUTE OF CERTIFIED INVESTMENT AND FINANCIAL ANALYSTS

8TH ANNUAL CONFERENCE

**Financial Health
Solutions For All**

WWW.ICIFA.CO.KE

COUNCIL MEMBERS 2024/25

ABOUT ICIFA

The Institute of Certified Investment and Financial Analysts (ICIFA) is the only professional body mandated to regulate the Investment and Financial Analysis profession in Kenya. ICIFA registers and licenses Certified Investment and Financial Analysts (CIFAs) in Kenya both in private and public practice under the Investment and Financial Analysts Act (No.13 of 2015).

OUR VISION

The leading institute for investment and finance professionals.

OUR MISSION

To promote excellence and professionalism amongst our members and the financial industry.



FFA Leah Nyambura
Chairperson



FA Catherine Karita
Vice-Chairperson



FA Judith A.M. Nyakawa
Council Member Representing
the Cabinet Secretary -
National Treasury, the National
Treasury and Economic Planning



FFA Prof. Nicholas Letting', EBS
Council Member Representing
Kasneb



FA Kamunyu Njoroge
Council Member Representing
the Capital Markets Authority



CPA Frank Mwiti
Council member representing
Nairobi Securities Exchange



FA Elizabeth Irungu
Council Member



FA Anthony Mwithiga
Council Member



FA Purity Kagendo
Council Member



FA David Kanyi, HSC
Council Member



FA Geoffrey Odundo
Council Member



FA Diana Muriuki-Maina
CEO & Secretary to the Council

STATUTORY COMMITTEES



FFA Dr. Jonah Aiyabei, Ph.D
Chairman, Registration
Committee



FFA Job Kihumba
Chairman, Disciplinary
Committee



FFA Lazarus Kimang'a, EBS
Governance, Nomination
and Remuneration Committee
Chairman



FFA Dr. George Wakah
Chairman, ICIFA College

CONFERENCE PROGRAMME

DAY 1

Wednesday, May 7 2025

TIME	SESSION
8:00 am – 8:30 am	Registration of Delegates
8:30am – 8:40am	<p>Welcome and Introduction (Announcements and housekeeping matters)</p> <p>SPEAKER FA Diana Muriuki-Maina, <i>Chief Executive Officer</i></p>
8:40am – 8:50am	<p>Conference Agenda: Financial Inclusion for All.</p> <p>SPEAKER FA Catherine Karita, <i>Vice Chairperson</i></p>
8:50am – 9:00am	<p>Chairperson Welcomes Guests and Invites Chief Guest to Address the Conference</p> <p>SPEAKER FFA Leah Nyambura, <i>Chairperson</i></p>
9:00am – 9:30am	<p>Key note Address: The Global vs Kenya Landscape of Financial Health.</p> <p>GUEST SPEAKER Mr. Cappitus Chironga Jazz <i>Representing the Deputy Governor, Central Bank of Kenya</i></p>
9:30am – 9:45am	<p>Brief session: Promoting Financial Solutions Through the Media</p> <p>SPEAKER FA Geoffrey Odundo, <i>Chief Executive Officer, Nation Media Group</i></p>
9:45am – 10:00am	Sponsor Presentation: KCB
10:00am – 10:30am	TEA/COFFEE BREAK
10:30am – 11:00am	<p>Panel Session: The Evolving role of Investment and Finance Professionals in Financial Health</p> <p>MODERATOR FA Catherine Karita, <i>ICIFA Council, Vice Chairperson</i></p> <p>PANEL MEMBERS Mr. Cappitus Chironga Jazz, <i>Representing the Deputy Governor, Central Bank of Kenya</i> FA Fred Mburu, <i>CEO, Fund Managers Association</i> FFA Job Kihumba, <i>Corporate Director, SIB</i></p>
11:00am - 11:15am	QUESTION AND ANSWER SESSION
11:15am – 11:45am	<p>Regulatory Frameworks supporting Financial Health</p> <p>SPEAKER FA Samuel Njoroge, <i>Senior Manager, Education, Awareness and Certification, Capital Markets Authority</i></p>

CONFERENCE PROGRAMME

DAY 1

Wednesday, May 7 2025

TIME	SESSION
11:45am – 12:00pm	QUESTION AND ANSWER SESSION
12:00pm – 12:30pm	Financial Health solutions for government institutions. SPEAKER FFA Prof Nicholas K. Letting', <i>Chief Executive Officer, kasneb.</i>
12:30pm – 12:45pm	QUESTION AND ANSWER SESSION
12:45pm – 13:00pm	SPONSOR PRESENTATION/PHOTO SESSION
13:00pm – 14:00pm	LUNCH BREAK
14:00pm – 14:30pm	Sustainable Finance and ESG Investments SPEAKER FA Barrack Obatsa, <i>CEO, Britam Asset Managers Limited.</i>
14:30pm – 15:15pm	PANEL DISCUSSION Ethics and Professional Standards in Investment and Financial Advisory MODERATOR FA Anthony Mwaura Murimi, <i>Member, ICIFA</i> PANEL MEMBERS FA Juddie Nyakawa, <i>Deputy Senior Director, The National Treasury</i> FA Barrack Obatsa, <i>CEO, Britam Asset Managers Limited</i> FFA Prof. Nicholas K Letting' <i>CEO, kasneb</i> FA Maurice Opiyo, <i>Managing Director, KCB Investment Bank</i>
15:15pm – 15:45pm	QUESTION AND ANSWER SESSION
15:45pm	TEA/COFFEE BREAK
19:00pm – 21:00pm	 <h3>Gala Dinner & Cocktail</h3> <p>Brief Session by Moses Nyabanda, <i>Managing Director, Equity Bank Kenya Limited</i></p> <p>Dress code smart casual</p> 

CONFERENCE PROGRAMME

DAY 2

Thursday, May 8 2025

TIME	SESSION
8:30am – 8:45am	Recap of previous day's deliberations
8:45am – 9:30am	Case Study Presentations: Successful Financial Health Initiatives SPEAKER Tamara Cook, <i>CEO, FSD Kenya</i>
9:30am – 9:45am	QUESTION AND ANSWER SESSION
9:45am – 10:15am	Leveraging Fintech for Financial Inclusion and Health SPEAKER Gitau Macharia, <i>Product Lead, Wealth & Investments at Safaricom PLC</i>
10:15am – 10:30am	QUESTION AND ANSWER SESSION
10:30am – 11:00am	TEA/COFFEE BREAK
11:00am – 11:30am	Structuring Inclusive Financial Deals: unlocking capital for the underserved markets SPEAKER FA Maurice Opiyo, <i>Managing Director, KCB Investment Bank</i>
11:30am – 11:45am	QUESTION AND ANSWER SESSION
11:45am – 12:15pm	Innovative credit scoring models for promoting financial inclusion, and expanding credit access in the region SPEAKER Reuben Kimani Mwangi, <i>Managing Director, Eden Bridge Capital</i>
12:15pm – 12:45pm	Emerging Trends in Financial Planning for Individuals and SMEs SPEAKER FA Monica Mwaniki, <i>Co-founder & CEO, Arvocat Asset Managers</i>
12:45pm – 13:00pm	QUESTION AND ANSWER SESSION
13:00pm – 14:00pm	LUNCH BREAK
14:00pm – 14:30pm	Investing vs gambling: the role of finance and investment professionals in promoting viable investments. SPEAKER FA Patricia Kiwanuka, <i>Managing Director, Revenue Stream Limited</i>
14:30pm – 14:45pm	QUESTION AND ANSWER SESSION

CONFERENCE PROGRAMME

DAY 2

Thursday, May 8 2025

TIME	SESSION
14:45pm – 15:30pm	<p>PANEL DISCUSSION</p> <p>Investment Strategies for Diverse Demographics</p> <p>MODERATOR FA Njoroge Kamunyu</p> <p>PANEL MEMBERS Rueben Kimani Mwangi, <i>Managing Director, Eden Bridge Capital</i> FA Monica Mwaniki, <i>Co-founder & CEO, Arvocat Asset Managers</i> FA Patricia Kiwanuka, <i>Managing Director, Revenue Stream</i></p>
15:30pm – 15:45pm	QUESTION AND ANSWER SESSION
15:45pm	TEA/COFFEE BREAK

CONFERENCE PROGRAMME

DAY 3

Friday, May 9 2025

TIME	SESSION
9:00am – 9:15am	Recap of previous day's deliberations
9:15am – 9:45am	Open Discussion: Collaborative Approaches to Financial Education SPEAKER FA Victor Odendo, <i>Head and Principal Officer, KCB Asset Management Limited</i>
9:45am – 10:00am	QUESTION AND ANSWER SESSION
10:00am – 10:45am	Interactive Session: Developing a Financial Health Action Plan SPEAKER FA David Kanyi, <i>ICIFA Council Member</i>
10:45am – 11:15am	TEA/COFFEE BREAK
11:15am – 12:15pm	 Breakout Session: Interactive quiz challenge to aid in practical learning <i>Prizes to be won!</i>
12:30pm – 13:00pm	Closing Remarks FFA Leah Nyambura, <i>Chairperson of the Institute</i> FA Diana Muriuki-Maina, <i>Chief Executive Officer, ICIFA</i>
13:00pm - 14:00pm	LUNCH BREAK

SPEAKER PROFILE



CHIEF GUEST

GERALD NYAOMA ARITA

**DEPUTY GOVERNOR OF THE
CENTRAL BANK OF KENYA (CBK).**

Mr. Gerald Nyaoma is Deputy Governor of the Central Bank of Kenya (CBK). He was appointed to this role by His Excellency President, with effect from December 6, 2024.

Prior to this appointment, Mr. Nyaoma led a long and illustrious career at the Bank, spanning over thirty-six years. During this time, he worked in various senior positions and served as Director in Bank Supervision, Financial Markets, Banking Services, and Internal Audit Departments. Mr. Nyaoma contributed to major transformations of Kenya's financial system, capital markets, banking, payments, including most notably, leading the effort that gave rise to the launch of mobile money services in Kenya, an innovation that was later adopted in various countries globally. In recognition of this pioneering role, Mr. Nyaoma was named as a Mobile Policy Champion by the Alliance for Financial Inclusion (AFI), acting as its ambassador to promote best practice in mobile money regulation in AFI member countries.

Mr. Nyaoma also represented the Bank as an Alternate to the Governor at the Boards of the Sacco Societies Regulatory Authority (SASRA), the Capital Markets Authority (CMA) and the Kenya Deposit Insurance Corporation (KDIC).

Mr. Nyaoma holds an M. Phil. (Econ.) degree from the University of Cambridge, United Kingdom, and BA (Economics) First Class degree from the University of Nairobi. He is a Certified Public Accountant (CPA-K), a Certified Public Secretary (CPS-K) and an Associate of the Kenya Institute of Bankers.

SPEAKER PROFILE



CAPPITUS CHIRONGA JAZZ

**FINANCIAL SECTOR ANALYSIS
FUNCTION, CENTRAL BANK OF
KENYA (CBK)**

Mr. Cappitus Chironga Jazz currently heads the team on financial sector analysis function at the Central Bank of Kenya, focusing on research on financial stability and financial inclusion. Possess wide experience and expertise in financial markets, public debt, and financial sector issues in Kenya, East Africa, Continental Africa, and globally, spanning more than 20 years.

An alumnus of Warwick Business School, University of Warwick, UK, Master of Science in Economics and Finance, University of Nairobi School of Economics, Master of Arts in Economics and Bachelor of Arts in Economics (FIRST CLASS HONOURS). Holds senior leadership certification from Nanyang Technological University in Singapore and Strathmore University Business School in Kenya. Also, an Accredited Fellow of Macroeconomic and Financial Management Institute of Eastern and Southern Africa (MEFMI) specializing in local currency bonds markets.

Versed experience traverses macroprudential analysis and surveillance, financial inclusion, public debt management, local currency bond markets, and financial sector issues. Has consulted widely, led country missions, facilitated and spoke at many local, regional and international fora. Seats on and leads many national, regional and international working groups, standing committees and taskforces that shape policy discourses.

Published in peer-reviewed books and journals and involved in wide-ranging research work and studies, locally and abroad on financial sector issues, public debt management and macroeconomy.

SPEAKER PROFILE




FFA LEAH NYAMBURA

CHAIRPERSON, ICIFA COUNCIL

She is currently the Director, Corporate Finance at Dyer and Blair Investment Bank since 2014, having worked with the firm for 20 years. Previously, she headed the Research Department. She has had the privilege to be Lead Consultant in Investments, Corporate Finance, Transaction Advisory, Government Privatizations, Equity and Debt Funding, Mergers, Acquisitions and Capital Markets Transactions in Kenya and the East Africa region. She also serves as a Director in, Uganda Securities Exchange (USE) since September 2021.

At ICIFA, she currently serves as the Chairperson to the council, having previously served as the Chairperson of ICIFA College, and is the immediate former Vice Chairperson of ICIFA Council, which she left after serving two terms as a Council member during the period 2016 - 2022.

She has been a member of the Registration Committee since 2022 and previously served as a member of the Finance & Strategy Committee during the period 2021 - 2022. She also served as Chair of the Membership Services Committee during the period 2020 - 2021 after serving as Vice Chair of the Committee during the period 2019 - 2020, and a member since 2018. She served as a member of the Professional Standards Committee during the period 2016 - 2018. She has been instrumental as an Organizer, Speaker, Panelist and Moderator in various conferences held by ICIFA since 2016.

SPEAKER PROFILE



FA CATHERINE KARITA

VICE CHAIRPERSON, ICIFA

FA Catherine is the Vice Chairperson with effect from 30 June 2022. She is an Executive leader with over 14 years of leadership in financial services. She is the current Director, Strategy, and Investor Relations at Britam Holdings Plc a position she has held since December 2021. Prior to this appointment, she held various roles at NCBA Investment Bank, as the Executive Director in Charge of Brokerage, at SBG Securities as Head of Institutional Clients Sales and Trading, and at Bank of America.

FA Catherine's educational background includes a Bachelor of Law from the University of Nairobi, a Diploma in Law from the Kenya School of Law, an MBA from the University of Baltimore, and a B.Sc. Information Systems from the University of Maryland Baltimore County.

She is passionate about educating the youth on investing and financial planning as well as driving a high-performance culture within the organizations for which she has worked, simplifying processes and providing financial solutions to address various client needs.

She is a thought leader in the industry and was recognized by the Business Daily as a top 40 under 40 women in Kenya in 2014 for her contributions within the Capital Markets and Financial Services Space.

FA Catherine is the current Chairperson for the Membership Services Committee

SPEAKER PROFILE



FFA PROF. NICHOLAS LETTING'

CEO, kasneb

PROF. NICHOLAS K. LETTING', Ph.D., EBS, currently the Secretary/Chief Executive Officer (CEO) of Kenya Accountants and Secretaries National Examination Board (kasneb) and the immediate past Vice-Chancellor/Chief Executive Officer of the Management University of Africa (MUA) has over ten (10) years in strategic leadership as CEO and Chairman in various organizations. He has provided top notch administrative, financial, strategic leadership, coaching and mentorship services to the organizations he has served in. He is a

Fellow of four (4) premier professional bodies. He is an Adjunct Associate Professor at KCA University, Kenya where he was appointed in July 2023. He has attended several leadership courses including The Effective Director training at Strathmore University Business School (SBS) and the Strategic Leadership Development Programme (SLDP) at the Kenya School of Government.

Prof. Letting' holds a Doctor of Philosophy (PhD) in Business Administration (Strategic Management), Master of Business Administration (MBA) and Bachelor of Commerce (B. Coms Hons) (Marketing option) degrees from the University of Nairobi. He also holds Final Certificates from kasneb in the following Professional Qualifications: Certified Public Accountant (CPA); Certified Public Secretary (CPS) and Certified Investments and Financial Analyst (CIFA).

Prof. Letting' has over twenty-five (25) years' experience in industry and academia in private, public and not-for-profit organizations. He has supervised several doctoral and masters' degree students successfully and has been external examiner in leading Universities. He has worked with kasneb, MUA, Kenya Institute of Management (KIM) and BAT Kenya. Prof. Letting is a Fellow of the Institute of Certified Secretaries (ICS), a Fellow the Institute of Certified Public Accountants of Kenya (ICPAK), a Fellow of KIM and a Fellow of the Institute of Certified Investments and Financial Analysts (ICIFA) and a member in good standing at The Institute of Directors (IoD) and the Institute of Human Resource Management (IHRM). He is a thought leader and facilitates in governance and leadership seminars/workshops.

He is also a member of Council/Board in ICPAK, ICS, ICIFA and PSASB and chairs various Committees. In May 2023 he was elected Chairman of the Association of Professional Societies of East Africa (APSEA) where he previously served as Honorary Treasurer for four (4) years. He represents APSEA on the Board of Public Sector Accounting Standards Board (PSASB). He is a volunteer in many societal development and humanitarian organizations such as the Kenya Red Cross Society (KRCS) where he is currently Honorary Treasurer in Lower Eastern Region (LER). In 2020 Prof. Letting' was awarded the Elder of the Order of the Burning Spear (EBS) having received the Head of State of Commendation (HSC) in 2012. Prof. Letting' was Chairman of the Institute of Certified Public Secretaries of Kenya (ICPSK) from 2014 to 2016. Between 2020 and 2023, he was a member of two Multi – Agency Taskforces (MAT) appointed by the Cabinet Secretary, The National Treasury and Economic Planning that reviewed The Accountants' Act and the Certified Public Secretaries' Act and participated in the drafting of Accountants Act Regulations, 2022. He was a Council Member of the Kenya Institute of Curriculum Development (KICD) during the formulation of the Competency Based Curriculum for the Basic Education in Kenya. He was a member of the National Commission for Science Technology and Innovations (NACOSTI).

SPEAKER PROFILE



FA WYCLIFFE SHAMIAH

**CHIEF EXECUTIVE OFFICER,
CAPITAL MARKETS AUTHORITY**

Mr. Shamiah is the Chief Executive of the Capital Markets Authority effective 19 November 2020. He was previously the Director of Market Operations.

He has worked at the Authority for over 23 years in various capacities. He has gained wide experience in operations of capital markets. Over the years, he held different positions in different departments, having joined as a research officer, promoted to senior research officer before being appointed senior financial analyst cum internal auditor. He was then promoted to the position of Assistant Manager, Compliance in 2001 before taking on the responsibilities of officer in charge of compliance from 2003 to 2005 during a transition period when the entire senior management and board of the Authority were overhauled. He was then appointed Manager, Market Supervision in 2009 and became the pioneer Director of Market Operations in 2011. He chairs various committees within the Authority including the Technical arm (CnF) and the Regulatory Sandbox Committee. He is a Co-Chair of the Capital Market Master Plan Secretariat.

Mr Shamiah holds a Bachelor's Degree in Economics and Mathematics from Egerton University and a Master's in Business Administration (Finance) from the University of Nairobi. He is a Certified Public Accountant of Kenya and a member of the Institute of Certified Public Accountants of Kenya. He received his ICPAK commendation in 2013 as well as ICPAK Fellowship in 2016.

He has served the Kenyan Accountancy Institute in various capacities having been an evaluator during the initial Best Presented accounts awards before being converted to FiRe Awards and sat on the FiRe Awards Technical Committee for various years. He has also served on the ICPAK Innovations Committee in 2003 and Financial Services Committee of ICPAK in 2009, mainly bringing on board developments in capital markets and the financial sector in general. From 2009 he serves on the ICPAK Council representing the Capital Markets Authority. While on Council he has been a member of Research and Development Committee as well as the Audit, Risk and Compliance Committee where he was the convenor in 2016/17. He advocates for integrity and transparency in ensuring there is compliance to set standards as far as possible.

Mr. Shamiah is an alumna of the US International Visitors Programme and an Associate of Toronto Leadership Centre. He has equally been the Chairperson of TC 68(Financial Services Technical Committee) of Kenya Bureau of Standards (KEBS). He was awarded a certificate of completion for the SMREA Program, March 2018, Harvard University, John F. Kennedy School of Government, Executive Education.

He is also the Chairman of the Market Supervision and Risk Management sub-committee of the East African Securities Regulators Forum (EASRA), a regional securities regulators umbrella organization in the East African Community (EAC). He also sits on the Financial Stability Board Regional Group of Sub-Sahara representing Kenya and the capital markets.

SPEAKER PROFILE



MOSES NYABANDA

MD, EQUITY BANK KENYA LTD

Moses has 22 years of deep and broad experience in delivering sustainable strategic value for organizations throughout his consulting career. He joined Equity from PwC where he was the Managing Director and Country Senior Partner in Rwanda.

Before joining Equity Group, Mr Nyabanda was the Managing Director and Country Senior Partner for PricewaterhouseCoopers (PwC) in Rwanda and a member of PwC Eastern Africa leadership team. He has a proven track record of leading effective teams, strategic planning, driving business growth and delivering impactful solutions to businesses and governments in Kenya, Rwanda, Uganda, and the United Kingdom. He has worked closely with Executive Teams, Boards of Directors, and Senior Government officials to co-create trusted solutions to business challenges and has over the years developed trusted relationships and networks across different markets.

While at PwC, he was responsible for driving operational efficiency including resource planning, digital transformation, innovation, and cost management at PwC Eastern Africa. At Equity Group, Mr Nyabanda is a key member of the executive team who has demonstrated commitment to the Group's corporate philosophies and customer value creation. Throughout his career, Mr. Nyabanda has distinguished himself as a disciplined and thorough professional, demonstrating exceptional leadership in promoting robust control environments and productivity.

SPEAKER PROFILE



MAURICE OPIYO

MD, KCB INVESTMENT BANK

Maurice Opiyo is currently serving as the Managing Director at KCB Investment Bank. He is a seasoned Investment Banker with over 15 years in Senior Leadership in Investment banking, having served and excelled in NCBA Group as the Executive Director, Managing Director at NIC Capital and other prestigious firms. In his various roles, he has led and brought to market various innovative financial instruments and landmark transactions that cut across the various sectors of the economy within the East African region.

SPEAKER PROFILE



FA DAVID KANYI

**SENIOR MANAGER, DIGITAL FINANCIAL
SERVICES AT SAFARICOM PLC**

FA David joined as a Council Member on 24 June 2022. He is a dedicated, diligent and hardworking Financial Services professional. He has over 18 years of Capital Markets experience having worked at the Capital Markets Authority transitioning to the Telecommunications Sector to join Safaricom PLC in 2021. Currently, he is the Senior Manager, Digital Financial Services at Safaricom PLC, where he is responsible for developing digital financial services with the goal of fostering a saving culture, empowering Kenyans, and improving their financial health through M-PESA. Previously, he held various positions in the capital markets environment, including Head of Market Deepening, Market Surveillance in Derivatives and Cash Market at both the Capital Markets Authority (CMA) and the Nairobi Securities Exchange (NSE).

As a Champion at the Capital Markets Authority, he was instrumental in shaping and implementing the Capital Markets Master Plan and setting up Market Deepening departments and promoting regional integration within the EAC.

He holds a Bachelor of Commerce degree in Finance from the University of Nairobi. He is also a member of the Kenya Institute of Management. He is currently pursuing a Master of Science in Finance and Investment at Leicester University.

His passion is to develop the next generation of financial services professionals by ensuring that the link between theory and practice is well articulated through relevant curriculum and to drive Fintech acceptance as a lifestyle.

Away from his busy schedule, he enjoys golfing and reading blogs about Fintech and current events, both local and global.

SPEAKER PROFILE



TAMARA COOK

**CHIEF EXECUTIVE OFFICER,
FSD KENYA**

Tamara Cook was appointed the CEO of FSD Kenya in July 2019. She has been with FSD Kenya since 2014 as the Head of Digital Innovations with a focus on using finance to create value for low-income households, women and enterprises. With more than two decades of experience in inclusive finance, Tamara has also worked with the Bill & Melinda Gates Foundation, the World Bank's Consultative Group to Assist the Poor (CGAP), and Equity Bank in Kenya. She has an MBA from INSEAD, a BA in International Affairs from George Washington University and is an Executive Coach.

SPEAKER PROFILE



FA BARRACK OBATSA

**CHIEF EXECUTIVE OFFICER, BRITAM
ASSET MANAGERS LIMITED (BAM) (K)**

Mr. Barrack Obatsa has over 18 years of experience in the investment industry and has served in various capacities including as Chief Investment Officer, ICEA LION Asset Management Limited, where he worked for 7 years. Prior to joining ICEA LION, Barack worked at Africa Alliance Bank Limited for 11 years, rising from Analyst to Regional Chief Investment Officer.

Barack holds a Bachelor of Science Degree in Financial Services from the University of Manchester Institute of Science & Technology, a Master of Science in Finance (Economic Policy) from the University of London, and a Master of Science in Real Estate (Investment and Finance) from the University of Reading.

His professional designations include Chartered Banker, Certified Internal Auditor (CIA), and Chartered Financial Analyst (CFA). He is a member of the Institute of Certified Investments & Financial Analysts - Kenya, the Institute of Internal Auditors - Kenya, the CFA Institute, and the Royal Institution of Chartered Surveyors (RICS). Additionally, he is a Certified Engagement and Productivity Coach (CEPC), having successfully completed a globally accredited coaching program with CDI – Africa Coaching.

SPEAKER PROFILE



FA PATRICIA KIWANUKA

**MANAGING DIRECTOR AND
FOUNDER, REVENU STREAM
LIMITED**

FA Kiwanuka is an accomplished financial services and management expert, currently Managing Director and Founder of the Revenu Stream Limited. She has worked for more than 20 years in Eastern Africa at leading financial institutions including UAP – Old Mutual Group, Sanlam (formerly AIG Investments) and Zamara (Alexander Forbes) Financial Services.

FA. Kiwanuka holds board positions at NSE Clear Ltd and AAR Insurance Kenya. She is a trustee on the board of Banki Kuu (CBK) Scheme and is the chairperson at NSE Derivatives Product Advisory Committee. She is a CFA(R) Charter holder and member of the CFA Institute – USA, a Council member of the Institute of Certified Financial Analysts, ICIFA – Kenya.

She holds a Master of Business Administration (Finance) and a Bachelor of Science Degree (Actuarial Science/Statistics) from the University of Nairobi, attended an executive management course at INSEAD and is currently undertaking a Masters in Counselling Psychology at Daystar University. In recognition of her contributions to the industry and society, Ms. Kiwanuka was awarded the Head of State commendation of Order of the Golden Warrior (OGW) in December 2021 and was accepted by Her Majesty the Queen as a Member in the Order of St. John on 4 January 2022.

SPEAKER PROFILE



FA VICTOR ODENDO

**HEAD & PRINCIPAL OFFICER, KCB
ASSET MANAGEMENT LIMITED**

Victor Odendo is a seasoned investment professional with over 16 years' experience in investment and asset management. He is the current Head & Principal Officer at KCB Asset Management Limited, having served as the Head & Principal Officer at Natbank Trustee & Investment Services Limited.

He has previously served as the Principal Officer, Cytonn Asset Managers Ltd as well as General Manager of Seriani Asset Managers and Senior Investment Manager at CIC Asset Management. He holds a Bsc. in Finance from the United States International University (USIU).

SPEAKER PROFILE



FA FRED MBURU

CEO, FUND MANAGERS ASSOCIATION

Introducing Fred Mburu, a visionary leader at the helm of the Fund Managers Association (FMA) Kenya as its inaugural CEO wef January 2024. Charged with steering the industry toward strategic goals, Fred is a catalyst for change, emphasizing advocacy, professionalism, and integrity.

With a distinguished career spanning over two decades in the fund management industry, Fred is a highly regarded and successful executive leader. His journey to the top includes a pivotal role as the Chief Executive of Apollo Asset Management, where he showcased his exceptional leadership acumen. Prior to that, he served as the Head of Investment Services at Old Mutual Investment Group, solidifying his reputation as a strategic thinker with an unwavering commitment to excellence.

Fred's career traces back to the prestigious Citi Bank, where he embarked on his professional journey, honing his skills and shaping his trajectory. His formative years at Barclays Bank saw him emerge as a pioneer Portfolio Manager, laying the foundation for a career marked by innovation and foresight.

As the driving force behind FMA Kenya, Fred Mburu brings not only a wealth of knowledge but a passion for transformative leadership. His commitment to industry best practices and dedication to shaping a future of Investment Management excellence make him a dynamic and inspiring figure in the world of fund management. Fred Mburu is not just a CEO; he is a trailblazer, a strategist, and a beacon of integrity, leading the way for the Fund Managers Association into a new era of success.

SPEAKER PROFILE



FA MONICA MWANIKI

**CO-FOUNDER & CEO, AVOCARP
ASSET MANAGERS**

At the helm of Arvocap Asset Managers stands Monica, a visionary leader who embodies financial acumen and strategic excellence. As the CEO, she is the driving force behind our commitment to delivering exceptional products and superior client service. Monica's leadership transcends conventional boundaries, shaping our investment strategies and driving us toward a prosperous financial future. With a dynamic vision, she has positioned ArvoCap as a trailblazer in the field, redefining the art of wealth management.

Her academic background includes a Master of Commerce from Strathmore University and a Bachelor of Arts from the University of Nairobi, providing her with a solid foundation in business and the arts. In addition to her degrees, she has further enriched her knowledge and skills by obtaining a Higher Diploma in IMIS (UK) and becoming a Certified Public Accountant of Kenya (CPAK) from Strathmore University. These qualifications have equipped her with a comprehensive understanding of information management systems and accounting principles, respectively.

As a member of the Institute of Certified Investment and Financial Analysts (ICIFA), she adheres to the highest standards of professionalism and ethics in her work. She also holds Chartered Institute for Securities & Investment (CISI) Level II qualifications, further testament to her commitment to continuous learning and professional development in the investment and financial services industry. With her impressive credentials and extensive experience, specifically in Fixed Income, Monica is poised to make significant contributions to the capital markets.

Monica brings over 14 years of experience in investment banking; servicing institutional and ultra-high-net-worth clients. She created a rapport and market connection as head of department – Fixed Income, Dyer & Blair, and formally as an associate at SIB, which aided her in closing some of the largest deals in the market, a feat that was recognised in the 2018 Investment Banking Awards.

SPEAKER PROFILE



GITAU MACHARIA

**PRODUCT LEAD, WEALTH &
INVESTMENTS AT SAFARICOM PLC**

Mr. Gitau Macharia is a seasoned Product Management leader with a strong background in fintech, credit, and wealth tech. Gitau has an MSc Financial Risk Management from the University of Glasgow and further education from Saïd Business School, University of Oxford,

Gitau combines practical experience with strong academic credentials. He is passionate about using technology to improve access to financial services and is eager to share his insights on product innovation and customer engagement.

SPEAKER PROFILE



RUEBEN KIMANI MWANGI

**CEO AND MANAGING DIRECTOR,
EDENBRIDGE CAPITAL LIMITED**

Mr. Reuben K. Mwangi, managing Director Edenbridge Capital is a career banker with over 20 years of experience in the commercial banking and microfinance sectors having served as the CEO of Century Microfinance Bank.

He holds a BSc. Applied Statistics Degree from Maseno University and has attended several management and leadership trainings. He has held various positions in operations, Credit Risk, Retail banking and Business development rising through the ranks.

Besides being a director in several local firms, Mr. Kimani is also a full member of Kenya Institute of Management (FKIM), Information Systems Audit and Control Association (ISACA). He is also an active Rotarian and has been a fellow at Accion: an initiative by the Center for Financial Inclusion that endeavors to advance inclusive finance.

Reuben Kimani is a recent graduate of Harvard Business School, undertaking a transformative leadership program to build business of the future.

PARTNER PROFILE

SUPPORTED BY



The Capital Markets Authority is an independent public agency established by an Act of Parliament, Cap 485 A under The National Treasury and Planning. The Authority came into being on December 15, 1989 when the Act was passed and was inaugurated in March 1990.

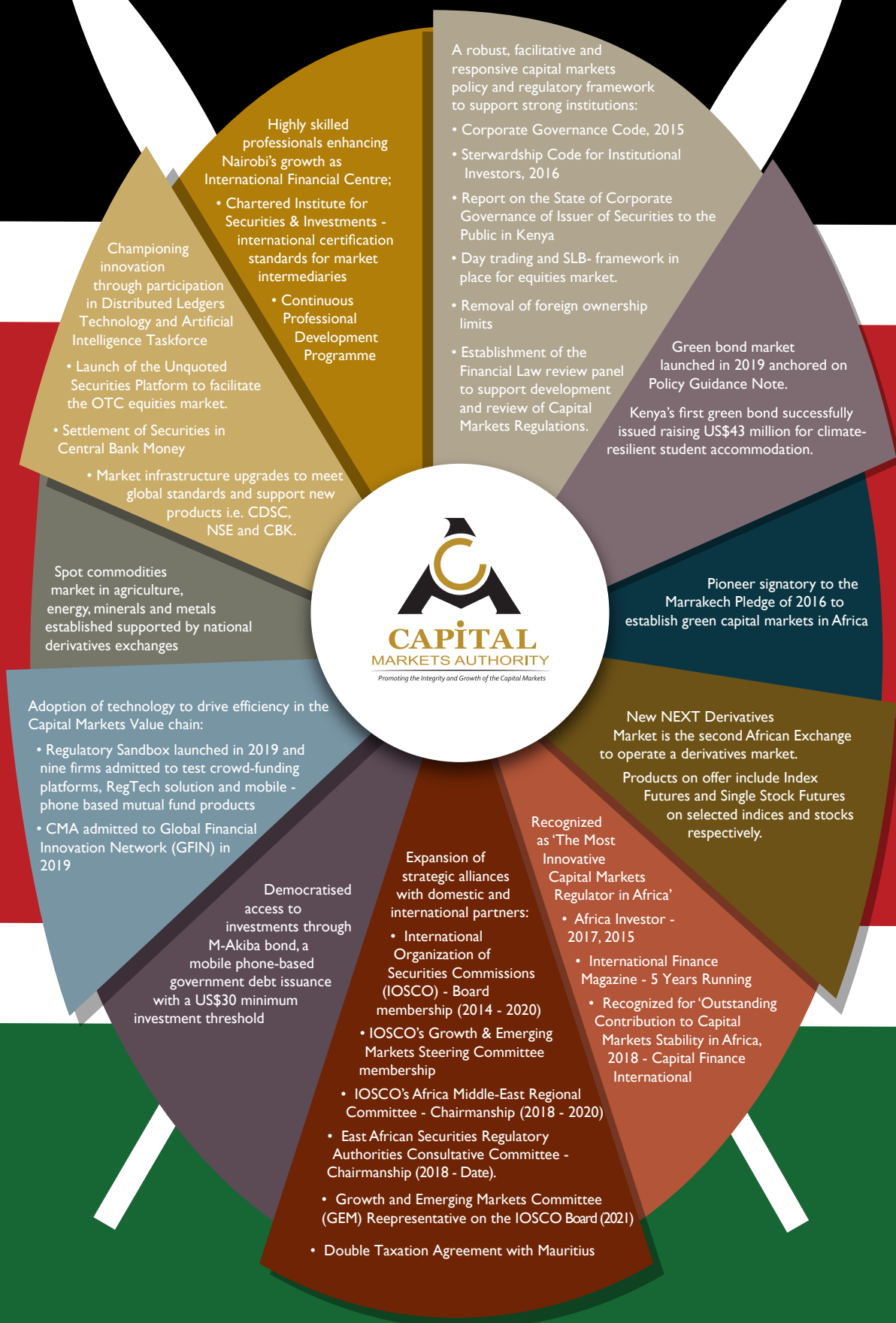
It is a regulating body charged with the prime responsibility of supervising, licensing and monitoring the activities of market intermediaries, including the stock exchange and the central depository and settlement system and all the other persons licensed under the Capital Markets Act. It plays a critical role in the economy by facilitating mobilization and allocation of capital resources to finance long term productive investments.

What We Do

The Authority derives its powers to regulate and supervise the capital markets industry from the Capital Markets Act and the Regulations issued there under. The regulatory functions of the Authority as provided by the Act and the regulations include the following:

- Licensing and supervising all the capital market intermediaries
- Ensuring proper conduct of all licensed persons and market institutions.
- Regulating the issuance of the capital market products (bonds, shares etc.
- Promoting market development through research on new products and institutions.
- Promoting investor education and public awareness
- Protecting investors' interest

Kenya's quest for a globally competitive capital market



PARTNER PROFILE

GALA DINNER PARTNER



About Safaricom

Safaricom is the leading telecommunication company in East Africa. Our purpose is to transform lives by connecting people to people, people to opportunities, and people to information. We keep over 41 million customers connected and play a critical role in society, supporting over one million jobs both directly and indirectly while our total economic value was estimated at KES 362 Billion (\$ 3.2 billion) for the 12 months through March 2021.

Listed on the Nairobi Securities Exchange and with annual revenues of close to KES 264 Billion (\$2.9 billion) as of March 2021. Safaricom provides connectivity through a wide range of technology, 2G, 3G, 4G, and 5G in aggregate covering over 99% of Kenya's population.

We run the world's largest mobile payment system and Africa's largest Fintech, M-PESA, the world's first mobile money transfer system. By empowering over 28 million customers to transact, save or borrow money through their mobile phones, M-PESA has driven financial inclusion in Kenya to more than 82% of the adult population from a low of 25% and generated over KES 82.65 Billion (\$826 million) in revenue as at FY21.

Our subsidiary, Safaricom Telecommunications Ethiopia, plans to deploy a world-class network and services, by mid-2022, to contribute to Ethiopia's digital transformation.

Safaricom is an equal opportunity employer, actively recruiting staff from different backgrounds reflecting the communities that we serve. We are committed to equal gender representation at all levels. Our target is to achieve 50:50 senior management gender parity by 2025.

As part of our ongoing commitment to the Sustainable Development Goals (SDGs), we continue to work towards improving energy and resource efficiency in our network and facilities to reduce carbon emissions and fuel consumption. We remain committed to becoming a Net Zero carbon-emitting company by 2050

For more details please visit www.safaricom.co.ke

For news, please visit: <https://www.safaricom.co.ke/about/media-center/publications/press-release>

For media-ready photos, visit: https://www.flickr.com/photos/safaricom_pr

For further information, please contact **Safaricom PR & Corporate Communications**

+254 722 005211 **PRComms@Safaricom.co.ke**

PARTNER PROFILE

GALA DINNER PARTNER



About Equity Group Holdings PLC

Equity Group Holdings Plc. is a Pan-African financial services holding company listed at the Nairobi Securities Exchange, Uganda Securities Exchange, and Rwanda Stock Exchange. The Group has banking subsidiaries in Kenya, DRC, Rwanda, Uganda, Tanzania, South Sudan, and a Commercial Representative Office in Ethiopia. It has other subsidiaries in investment banking, insurance, telecom, fintech and social impact investments. Equity Group is the largest integrated financial services firm in the region with a market capitalization of USD 1.27 Billion.

The Group has an asset base of USD 13.96 Billion, a customer base of 21.6 million supported by a footprint of 399 branches, 85,080 Agents, over 1.1 million Pay with Equity (PWE) merchants, 40,045 Point-of-Sale (POS) Merchants, 899 ATMs and an extensive adoption of digital banking channel. The Group's strong brand recognition, solid liquidity buffers and resilient funding profile, established domestic franchise and extensive adoption of digital and alternative distribution channels have earned it the honor of being the Second Strongest Financial Brand on Earth in 2024 by Brand Finance. It was also ranked strongest bank in Africa and 10th most valuable banking brand in Africa, with a Brand Strength Index (BSI) of 92.5 out of 100 and a brand ranking score of AAA+, the highest rating that a brand can attain.

Euromoney Awards for Excellence 2024 named Equity Bank Best Bank for Corporate Responsibility in Africa, Best Bank in Kenya, Best Bank for SME Banking in Kenya, and Best Bank for CSR in Kenya.

Global SME Finance Awards 2023 named Equity Bank the Platinum Winner in the categories of "SME Financier of the Year" and "Product Innovation of the Year" for its "Pay With Equity" initiative. Additionally, the Bank received an honorable mention in the "Women Financier of the Year" category.

The Bank was also named Best Trade Finance Bank in Kenya GTR Leaders in Trade Africa Awards 2023.

The Banker Top 1000 World Banks 2021 index ranked Equity Bank 22nd in Africa and 761 overall in its global ranking, 149th in soundness (Capital Assets to Assets ratio), 71st in terms of Profits on Capital and 39th on Return on Assets.

The Banker's Top 100 African Banks 2020 placed the Bank in position 7 overall among the top 10 Banks in Africa, 5th place on soundness, position 9 on growth performance, 8th on return on risk and position 6th in terms of profitability and on leverage category.

In the same year, Moody's gave the Bank a global rating of B2 with a negative outlook, the same as the sovereign rating of the Kenyan Government due to the Bank's strong brand recognition, solid liquidity buffers, resilient funding profile, established domestic franchise and extensive adoption of digital and alternative distribution channels.

For more information log on to Website: <https://equitygroup Holdings.com>

PARTNER PROFILE

SILVER PARTNER



KCB Investment Bank

KCB Investment Bank Limited is a subsidiary of KCB Group, offering a range of investment products and services, including money market funds, treasury bills, and bonds. They also provide custody services for customers looking to diversify their portfolios. KCB Investment Bank aims to provide secure and stable investment options with the potential for high returns.

Key features of KCB Investment Bank's offerings:

Money Market Fund:

A low-risk investment option suitable for risk-averse investors, with a minimum investment of KES 5,000. It offers monthly compounding and easy access to funds.

Treasury Bills & Bonds:

A stable and risk-free way to grow your money, with competitive interest rates.

Custody Services:

Services for customers looking to diversify their investment portfolio, including settlement of transactions, capital and income collection, and corporate actions processing.

Call Deposits:

An interest-bearing investment account allowing withdrawals without penalty.

PARTNER PROFILE

BRONZE PARTNER



INTRODUCTION

Kasneb was established as a state corporation under the National Treasury by the Government of Kenya on 24 July 1969. The establishment and operations of kasneb are governed by the Accountants Act, No. 15 of 2008, the Certified Public Secretaries of Kenya Act, Cap 534 of 1988 and the Investment and Financial Analysts Act, No. 13 of 2015.

VISION, MISSION, MANDATE AND CORE VALUES

The vision, mission, mandate and core values of kasneb are as follows:

Vision

Global leader in examination and certification of business professionals.

Mission

Empowering professionals globally by offering quality examinations and undertaking research and innovation.

Mandate

The mandate of kasneb is the development of syllabuses; conduct of professional, diploma and certificate examinations and certification of candidates in accountancy, finance, credit, governance and management, information technology and related disciplines; promotion of its qualifications nationally, regionally and internationally and the accreditation of relevant training institutions in liaison with the ministry in charge of education.

Core Values

- Integrity
- Professionalism
- Customer focus
- Teamwork
- Innovativeness

EXAMINATIONS OF kasneb

kasneb currently offers the following examinations:

POST-PROFESSIONAL SPECIALISATION COURSE

kasneb has introduced the Certified Forensic Fraud Examiner (CFFE). The course imparts knowledge, skills, values and attitudes to, among other competencies:

- Apply analytical techniques in fraud detection
- Design and implement preventive and detective controls
- Apply and ensure compliance with the appropriate laws in fraud investigations
- Apply the burden and standards of proof in civil and criminal proceedings
- Apply the various methods and techniques of conducting fraud investigations
- Write standard investigations and expert witness reports
- Develop fraud prevention programs
- Conduct a fraud prevention health check up
- Develop and implement a fraud risk management program

The course is aimed at persons who wish to qualify and work or practice in the fields of financial fraud and corruption investigations, fraud prevention, fraud risk analysis and related areas.

PROFESSIONAL COURSES

kasneb currently administers five professional courses:

- (i) *Certified Public Accountants (CPA)*
- (ii) *Certified Secretaries (CS)*
- (iii) *Certified Investment and Financial Analysts (CIFA)*
- (iv) *Certified Credit Professionals (CCP)*
- (v) *Certified Information Systems Solutions Expert (CISSE)*

DIPLOMA COURSES

kasneb currently administers three diploma programmes;

- (i) *Accounting Technicians Diploma (ATD)*
- (ii) *Diploma in Data Management and Analytics (DDMA)*
- (iii) *Diploma in Computer Networks and Systems Administration (DCNSA)*

CERTIFICATE IN ACCOUNTING AND MANAGEMENT SKILLS (CAMS)

The course imparts knowledge, skills, values and attitudes to prepare basic accounts and financial statements for a small enterprise or non-complex environment and apply basic management and marketing skills in business.

VOCATIONAL CERTIFICATE COURSES

These are short-term, skills-based programmes currently in the areas of entrepreneurship and innovation, graphic design, information and cyber security and Blockchain technology.

- (i) Vocational Certificate in Entrepreneurship and Innovation
- (ii) Vocational Certificate in Graphic Design
- (iii) Vocational Certificate in Information and Cyber Security
- (iv) Vocational Certificate in Blockchain Technology

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Facebook: KASNEBOfficial
Twitter: @KASNEBOfficial
Instagram : kasnebofficial

PARTNER PROFILE

COCKTAIL PARTNER

Britam

With you every step of the way

About Britam Asset Managers

Britam Holdings Plc is a leading diversified financial services Group listed on the Nairobi Securities Exchange and with a presence in seven countries in Africa namely; Kenya, Uganda, Tanzania, Rwanda, South Sudan, Mozambique and Malawi. The Group offers a wide range of financial solutions in Life Assurance, General Insurance, Health Insurance, Retirement Planning, Asset Management and Property. We are committed to safeguarding our customers' dreams and aspirations through a bouquet of financial services.



Our Purpose

Safeguarding dreams and aspirations

01



Our Vision

To be the **leading** diversified financial services company in our chosen markets across Africa

02



Our Mission

Providing you with financial security **every step of the way**

03



Our Values

Accountability, Trust, Agility, Customer Centricity

04

Britam Asset Managers is a subsidiary of Britam Holdings Plc incorporated in April 2004 to fill a gap in quality Fund Management and Investment Advisory services to individual and institutional investors.

The Company is licensed as a Fund Manager by Capital Markets Authority and Retirement Benefits Authority in Kenya and has grown remarkably to become an influential player in the financial services sector. In 2017, the Group opened Britam Asset Managers (Uganda) Ltd to extend the Company's asset management offering in the region.

PARTNER PROFILE

MEMBER FIRM



Arvocap is an investment services company providing innovative, techdriven products in fund management, wealth advisory, family offices, and corporate finance.

Our name, derived from "Arvo" (value) and "Cap" (capital), represents our mission to add value to investors' portfolios through innovative and riskadjusted investment solutions.



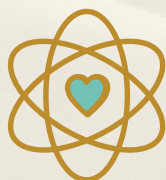
OUR MISSION

To be at the forefront of financial innovation, enhancing our services by harnessing technology and market insights, while maintaining a steadfast commitment to our values.



OUR MISSION

To empower investors to create, manage, and diversify their wealth through innovative solutions, helping them achieve their financial goals.



OUR MISSION

- Integrity
- Transparency
- Client-centricity
- Innovation
- Collaboration



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