



2023 UPEI Distinguished Alumni Award

Roger Sinclair (BBA 1979)

Be it career, family, personal interest, or philanthropy, when Roger Sinclair, BBA 1979, commits to something, he really commits.

Roger founded SBW Wealth Management in 1982, and more than 40 years later he continues to provide big picture advice that helps his clients achieve their financial and philanthropic goals. He likes to get to know his clients, to truly understand their challenges, needs, opportunities, and dreams before creating a clear plan of action.

Roger and his partners have built SBW into a thriving wealth management firm with eight employees, but if you visit the firm's website, you'll see that the emphasis remains on family. For Roger, family is a driving factor in much of his work and volunteer effort.

When his daughter Abigail was diagnosed with and survived cancer at a young age, Roger quickly understood the difficulties that such a diagnosis imposes on families in the Maritimes. He became involved with Brigadoon Village, a year-round recreational facility for children with cancer and other chronic illnesses and conditions, and he recognized an opportunity to put his commitment and planning skills to good use.

Roger chaired the Building Brigadoon Capital Campaign and helped the organization raise \$8.5 million to build Brigadoon Village—the first facility of its kind in Atlantic Canada and now the largest pediatric medical camp in all of Canada. Each year, Brigadoon Village, located on Aylesford Lake in Nova Scotia, provides joy and magical experiences for over 3,500 children who face profound health challenges, including more than 100 children from PEI.

Another of Roger's family commitments is not in name only. Roger is the president of the Clan Sinclair Association of Canada and has been an active member for over 30 years. He organized multiple National Clan gatherings, including in his native PEI in 2007 and again in 2023. The gatherings bring together Sinclairs from around Canada and the world to celebrate Scottish culture and history, and to build a sense of community with distant relatives. He also is currently a board member of The Scots: The North British Society in Halifax, which is the oldest Scottish society outside of Scotland.

One way Roger gives back to his profession is through his involvement with the Conference for Advanced Life Underwriting (CALU). This organization comprises 600 senior financial advisors from across Canada who are dedicated to grow and preserve the financial well-being of Canadians and family-owned businesses. He served for six years on the national board, including a year as Chair of the AGM as well as the Board Chair in 2019–2020.

The University of Prince Edward Island has benefitted immensely from Roger's commitment and passion since his graduation in 1979. He was a founding member and lead volunteer of the Halifax Friends of

UPEI chapter formed in 2004. The group helped to organize alumni events as well as to raise funds for student awards. Roger served for six years as a member on the UPEI Board of Governors and is a loyal and generous donor to the University.

For his community and volunteer efforts as well as commitment to client service, Roger was recognized in 2011 by Great-West Life with the prestigious Jack Hopwood Memorial Award.

In recognition of his career success and impressive volunteer and philanthropic support of Brigadoon Village and UPEI, the UPEI Alumni Association is proud to present Roger Sinclair, BBA 1979, with a 2023 Distinguished Alumni Award.