

# MERRIER TIMES AHEAD! THE MARITIME PLAN



## Three educational streams: Risk Management, Financial Planning, and Estate Planning



### CONFERENCE HIGHLIGHTS:

- Two and a half days of information packed sessions
- Top technical speakers loaded with sales and sales practice ideas
- Earn 20 FPSC verifiable CE credits or 20 Insurance credits or 10 IIROC credits
- Tradeshow Exhibition (2 days)
- Outstanding special events and networking opportunities
- Great Companion Program that includes all meals and events
- Great evening events

### HALIFAX MARRIOTT HARBOURFRONT HIGHLIGHTS:

- Indoor Pool and Whirlpool
- Fitness Centre
- Sauna
- Massage
- Nearby golf courses
- Interlude Spa on site
- Gift shop
- Beauty/barber shop
- Dine at 44 North, serving fresh seafood accompanied by a spectacular harbourfront view or the Fife and Drum Pub, featuring traditional Scottish fare.
- Unwind after a busy day at the 63 West Lounge serving cocktails & snacks.

Register via our website:  
<https://www.CIFPs.ca/Conference>  
or Call: 1-866-933-0233

## CIFPs 7<sup>th</sup> Annual National Conference - 2009

### Halifax Marriott Harbourfront

1919 Upper Water Street  
Halifax, Nova Scotia B3J 3J5

June 7<sup>th</sup> - 10<sup>th</sup>, 2009

### MERRIER TIMES AHEAD! THE MARITIME PLAN

*Join us at the premier financial planning gathering  
of major Canadian financial services organizations,  
planners, technical and educational experts*

*The CIFPs 7<sup>th</sup> Annual National Conference  
Be a Delegate*

#### REGISTER NOW AT OUR EARLY BIRD PRICES:

- |                                             |              |
|---------------------------------------------|--------------|
| ○ Member price                              | \$599.00 CAD |
| ○ Become a member and attend the conference | \$749.00 CAD |
| ○ Non-Member price                          | \$849.00 CAD |

Companion Program (All Dates)	\$300.00 CAD
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**Ask about our special group prices!**

5% GST will be added to the registration fee.

### Corporate Diamond Sponsors



### Strategic Partner Sponsor



### Corporate Platinum Sponsors





# CIFPs 7th ANNUAL CONFERENCE

2009

## Preliminary Agenda

## REGISTRATION INFORMATION

### Register NOW for the best rates!

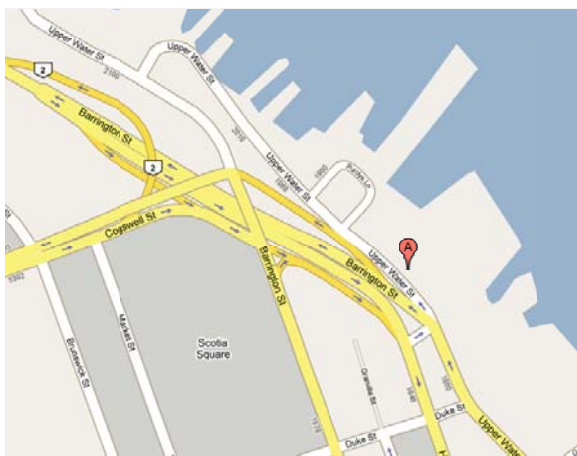
- Registration includes admission to all keynote addresses, educational sessions, exhibits, meals, the welcome reception and dinner, and all conference materials
- Register via our website: [www.CIFPs.ca](http://www.CIFPs.ca) OR
- Complete the enclosed registration form and fax to 647-723-6457

### More reasons to attend

- Exhibition showing the latest in products and services
- Special events
- Opportunities to network with financial planners from across Canada

### A great Companion Program

- Program includes all meals, events and sessions at a great rate



**Directions from Airport:** Take Hwy. 102 South to Hwy. 118 South to Hwy. 111 North. Take MacKay Bridge, Barrington St. exit. Follow Barrington St. to Hollis St. Hotel is on the left.

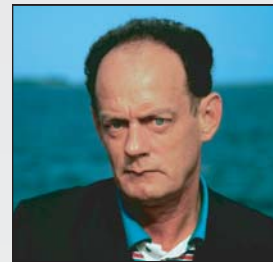
**Location:** Conveniently located on Halifax Harbour, the hotel offers fantastic waterfront views and is directly connected to the downtown business district and Casino Nova Scotia via an indoor skyway.

## » Rex Murphy - Social Commentator and Editorial Journalist

Rex's *Point of View* is sharp, provocative and pointed. A Rhodes scholar, Rex Murphy went to Oxford University (along with U.S. President Bill Clinton). Since that time, Rex Murphy's work has appeared in all media across the country. Described as *The National's* 'star opinion-jockey', Rex Murphy presents informed, entertaining and fiercely witty commentary on current events and noteworthy subjects.

*Cross Country Checkup* is Canada's only national open-line radio program, broadcast live across Canada every Sunday afternoon. Each week broadcaster and writer Rex Murphy moderates a lively discussion on an issue of national interest or importance, and invites listeners to call in with their opinions and thoughts.

His endearing style on air and on the platform showcases a sarcastic intellect and deep insight into issues affecting all Canadian individuals and businesses. Graced with his own brand of persuasion, no one walks away not knowing exactly what Rex Murphy thinks.



## » Lou Schizas, CIM, FCSI

[happycapitalism.com](http://happycapitalism.com)

### *A Planners Guide to Thriving Through a Recession*

Lou Schizas is an equities analyst, investor, entrepreneur, professor and television and radio personality - and a true believer in the happiness-inspiring powers of capitalism.

Lou is the 'business guy' for the John Oakley Show on Corus Radio's AM640 Toronto Radio. His successful "Happy Capitalism" segments also air on The McArthur Show on AM980 in London and have been heard on AM940 in Montreal, and on AM770 CHQR in Calgary. Lou draws inspiration for his segments from the business world, as well as from the stories of those he encounters. In that respect, he is especially inspired by his work as a Professor of Finance at Sheridan College Institute of Technology and Advanced Learning in Oakville, Ontario.

Between 1999 and 2007, Lou was the on-air Equities Analyst for Business News Network (BNN, formerly Report on Business Television), Canada's all-business television network, as well as a daily contributor to national network CTV's morning flagship program, Canada AM. A favourite with viewers, Lou analyzed over 16,000 stocks during his time with BNN.

Lou grew up in Flushing, Queens and bought his first stock at the age of eleven and started his first business at the age of fifteen. After heading west to find adventure, Lou settled in Calgary, Alberta, where he held 'real jobs' in the construction industry, and owned and managed Calgary's first comedy club. Lou then entered the finance field, and worked for many years as a financial advisor and wrote a personal financial column for the Calgary Sun. He also hosted a popular radio program called "The Money Manager" on AM 1060 CKMX.

Lou holds a Bachelor of Arts in Economics from the University of Western Ontario and did graduate work at the State University of New York at Stony Brook. He holds the Canadian Investment Manager (CIM) designation and is a fellow of the Canadian Securities Institute.

## » The Honourable Thomas Hockin, P.C.

*Former Minister of State (Finance) and former President, The Investment Funds Institute of Canada (IFIC)*

### *National Securities Regulation*

Mr. Hockin led The Investment Funds Institute of Canada and The Canadian Institute of Financial Planning from 1994 to 2006. He is a former director of the Institute of Corporate Directors, the Mutual Fund Dealers Association, the Canadian Capital Markets Association and voluntary boards. As a Member of Parliament and a Minister of State (Finance), he was responsible for the Blue Paper *New Directions for the Financial Sector* in 1986 and the Hockin-Kwintar Accord, which deals with the regulation of the securities-related activities of federally regulated financial institutions. As a Minister of International Trade, he carried out the negotiations on the side accords to the North American Free Trade Agreement in 1993. As a former professor, he is the author of several scholarly articles and four books. He was awarded an Honorary Doctor of Commerce by Ryerson University in 2006 for his contribution to public and academic life and for his volunteer work. Mr. Hockin has a business degree from the University of Western Ontario, a master's degree in public administration, and a Ph.D. in political science from Harvard University.

## » Terry Kelly, CM, BA, D.C.L., D.F.A

### *Celebrate Life with The Power of the Dream*

This Newfoundland native has been making music since his childhood years; has recorded six full-length recordings; has performed his original music in places as far away as Australia and Spain; has performed with Symphony Nova Scotia and the Edmonton Symphony; was nominated for four Canadian Country Music Awards and a JUNO; and has received seven East Coast Music Awards.

Terry's full-length recording, "The Power of the Dream", is the first commercially-produced music CD in the world that includes Braille on the liner notes and is packaged so that the entire text contents can be independently accessed by the blind, the visually-impaired and sighted alike from the enhanced disc.

The most recent single from Terry Kelly's "The Power of the Dream" recording was "A Pittance of Time". "A Pittance of Time" was written for and about veterans, peacekeepers, and the heroes at home. This song has been adapted to the French language and titled "C'est si peu de temps". Music videos for both audio tracks and a musical drama production ("Two Minutes of Silence - A Pittance of Time") for stage have been created from "A Pittance of Time".

In addition to his concert performances, Terry Kelly has developed and has delivered his "We Can Do Anything" and "The Power of the Dream" motivational presentations to tens of thousands of students, teachers, parents, government and business employees throughout Canada and the United States. Using personal anecdotes peppered with humour, songs and audience participation, Terry encourages individuals to develop their own values and strategies for living and working happily and healthily.

Stay tuned for further details on speakers as well as exciting entertainment details!

For more information about the conference, please visit our website at [www.CIFPs.ca](http://www.CIFPs.ca)

## Confirmed Sponsors To Date

### Gold Sponsors



### Media Sponsor



### Silver Sponsors





Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

# AGENDA >>

(Subject to change)

## Sunday, June 7<sup>th</sup>, 2009

4:30 PM	Registration & Check In
6:00 PM	Cocktail Reception
7:00 PM	Dinner / Keynote Speaker

## Monday, June 8<sup>th</sup>, 2009

7:00 AM	Breakfast
7:50 AM	Conference Opening Remarks
8:30 AM	Plenary Session
9:30 AM	Plenary Session
10:30 AM	Refreshment Break in Exhibitor's area
10:45 AM	Plenary Session
11:45 - 12:45 PM	Concurrent Education Sessions (3)
12:45 PM	Lunch
1:30 PM	Plenary Session
2:30 PM	Plenary Session
3:30 PM	Refreshment Break in Exhibitor's area
3:45 PM	Plenary Session
4:45 - 5:45 PM	Concurrent Education Sessions (3)
6:30 PM	Evening Event

## Tuesday, June 9<sup>th</sup>, 2009

7:00 AM	Breakfast
7:45 AM	Plenary Session
8:45 AM	Plenary Session
9:45 AM	Refreshment Break in Exhibitor's area
10:00 AM	Plenary Session
10:45 AM	Sponsor Networking Event
11:45 - 12:45 PM	Concurrent Education Sessions (3)
12:45 PM	Lunch
1:45 PM	Plenary Session
2:45 PM	Plenary Session
3:30 PM	Refreshment Break in Exhibitor's area
3:45 PM	Plenary Session
4:45 - 5:45 PM	Concurrent Education Sessions (3)
6:00 PM	Evening Event

## Wednesday, June 10<sup>th</sup>, 2009

7:00 AM	Breakfast
7:30 AM	Conference Closing Remarks
7:45 AM	Plenary Session
8:45 AM	Plenary Session
9:45 AM	Refreshment Break in Exhibitor's area
10:00 - 11:00 AM	Concurrent Education Sessions (3)
11:00 - 12:00 PM	Concurrent Education Sessions (3)
12:00 PM	Conference Adjourns

See online for the latest Agenda

Register online at - [www.CIFPs.ca](http://www.CIFPs.ca)

### >> Steven R. Wolff, MBA

CEO - Nova Scotia Pension Agency

Steven was appointed Chief Executive Officer of the Nova Scotia Pension Agency in the Spring of 2008.

The Agency provides pension administration and investment management services to the Nova Scotia Public Service Superannuation Plan and the Nova Scotia Teachers' Pension Plan. The two plans have approximately 60,000 members with combined assets of more than \$7 billion.

Steven has more than 20 years of experience in the global financial services industry with a focus on investment operations and risk management. Most recently he was a Senior Vice President with State Street Fund Services in Toronto. He holds a Bachelor in Science from Cornell University and a Masters in Business Administration from Boston College.

### Three Education Streams:

- Risk Management
- Financial Planning
- Estate Planning

Here is a preview of some of the educational sessions:

### >> Anthony Williams, CFP

Academic Director - CIFP

*Current Trends and Issues in Financial Planning*

### >> Paul Tyers, CA, CFP, CIM

Managing Director - HAHN Wealth Stewards

*Tax Efficient Global Investing*

### >> Tina A. Di Vito, CA, CFP, TEP, CSA

Director, Retirement Strategies - BMO Financial Group

Vice President & Managing Director - BMO Nesbitt Burns

*Single in Retirement*

### >> Cary List, CA, CFP

President and CEO of the Financial Planners Standards Council

*The New Reality - How societal greed has paved the way for financial planning*

### >> Roundtable: "To Fee or Not"

>> John DeGoey, MPA, CIM, FCSI, TEP, CFP

>> Marc Lamontagne, CFP, RFP, FMA

>> Terry F. Ritchie, CFP (US), RFP (Canada), EA (US), TEP

### >> Michael Nairne, CMC, CFA, CFP

President - Tacita Capital Inc.

*Mastering the New World of Advanced Asset Allocation*

### >> Shawn Brayman, B.Sc, MES

President - PlanPlus Inc.

*Navigating the Perfect Storm*

### >> Jamie Golombek, CA, CPA, CFP, CLU, TEP

*Hot Tax & Estate Issues for Investors*

### >> Janet Freedman, CFP, RFP

President - Finance Matters

*Registered Disability Savings Plans (RDSP)*

### >> Chris Toye, MBA, CGA, CFA, CFP

*Small Business Valuation for Financial Planners*

### >> Don Nilson, B.Comm., CMA, M.Sc. (Bus. Admin.), CFP

Nilson & Company

*TFSA versus other Investment Accounts*

### >> Doreen Gardner Brown, BHEC, CFP

President - Gardner Brown Consulting Inc.

*Collaborative Practice - a viable option for divorcing clients*

### >> Continuing Education Credits

Attending the conference and completing the related quizzes will qualify for your annual 20 FPSC verifiable CE credits or 20 Insurance credits or 10 IIROC credits.

The conference program has been developed following the guidelines for Continuing Education from the Financial Planners Standards Council. Please note, it is the CFP® licensee's responsibility to ensure this program meets their CE credits for the current year.

### Bronze Sponsors



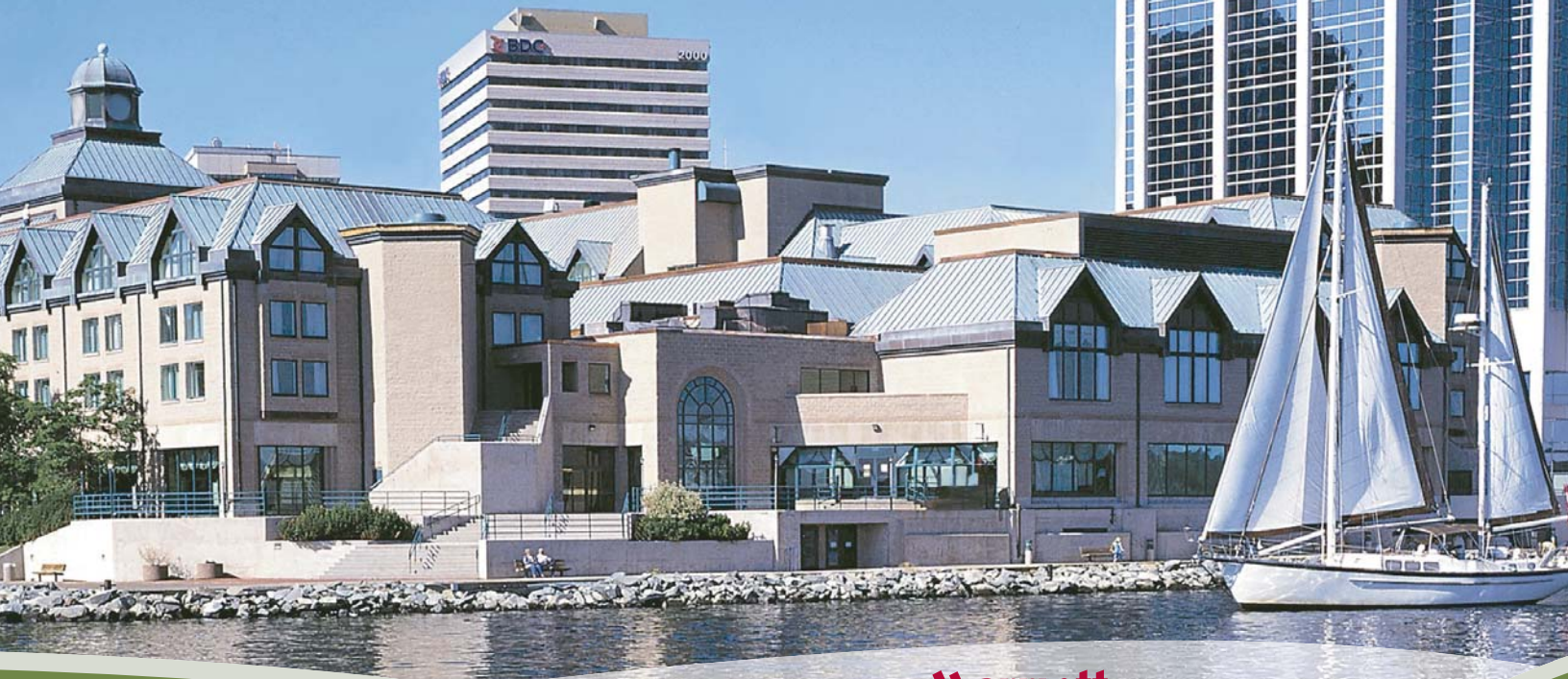


# 7<sup>th</sup> Annual National Conference - 2009

**Dates:** Sunday, June 7<sup>th</sup>, 2009 to Wednesday, June 10<sup>th</sup>, 2009

**CE Credits:** Earn 20 FPSC verifiable CE credits or 20 Insurance credits or 10 IIROC credits.

**Location:** Halifax Marriott Harbourfront, Nova Scotia



**Marriott.**  
HALIFAX  
HARBOURFRONT

## Flight Information:

WestJet and Air Canada fly to Halifax from all of the major Canadian cities such as Edmonton, Toronto, Winnipeg, Calgary and Vancouver.

Book now for the cheapest rates!

## Registration Information:

Registration includes admission to all keynote addresses, breakout sessions, exhibits, meals and all conference materials.

All attendees must pay the registration fee. Registrations received without payment will not be processed. Complete the registration form today and fax it to 647-723-6457.

## Recommended attire:

Casual attire is recommended for all sessions and for evening events.

## Weather:

The average daytime high temperature is 18 degrees Celsius and a nighttime low of 9 degrees Celsius.

1919 Upper Water Street, Halifax, Nova Scotia B3J 3J5 Canada  
Tel: 1-902-421-1700 Guest Fax: 1-902-422-5805

Conveniently located on Halifax Harbour, the hotel offers fantastic water front views and is directly connected to the downtown business district and Casino Nova Scotia via an indoor skyway. You will be steps away from popular Halifax attractions, including:

- o Art Gallery of Nova Scotia
- o Casino Nova Scotia
- o Pier 21
- o Bluenose II
- o Citadel Hill
- o Dalhousie University
- o Halifax Metro Centre
- o Discovery Centre
- o Maritime Museum of the Atlantic
- o Historic Properties
- o Titanic memorial and cemetery
- o Keith's Brewery



**Room Pricing:** \$209.00 CAD plus taxes per night (double)

**Hotel Website:** <http://www.HalifaxMarriott.com>

**Please call CIFPs for Hotel Reservations  
at 1-866-933-0233 x127**

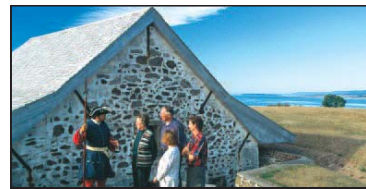
## *Halifax - History in the Making*

Nova Scotia is proud of its exciting and engaging history. Nova Scotia attractions are electric and exciting – from the urban attractions of the Halifax Citadel and Pier 21, to the rural provincial parks and sites on the UNESCO World Heritage List. Steeped in geological and cultural history, you may want to visit a Nova Scotia museum – some highlight the province’s awe-inspiring prehistoric remnants, while others tell the story of the province’s amazing immigrant heritage. There’s a lot to celebrate in Nova Scotia – and many attractions to help you.

Experience this history in dynamic and interactive ways throughout the province at the 27 locations of the Nova Scotia Museum, at National Historic Sites, Nova Scotia Historic Places and more than 110 community museums. Unearth 300-million-year-old dinosaur secrets and a treasure chest of natural heritage at Parrsboro's Fundy Geological Museum and Halifax's Museum of Natural History, where you'll also find the world's finest collection of Mi'kmaq quillwork. See impressive beadwork and learn of Nova Scotia's First People at the University College of Cape Breton's Mi'kmaq Resource Centre in Sydney. Bend your ear to the sounds of the pioneers at the reconstruction of Samuel de Champlain's 1605 fort at Port Royal, the oldest European settlement north of Florida. Feel the beat of the drum as the 78th Highland Regiment strikes up the band at the Halifax Citadel National Historic Site. Nova Scotia's museums set history a-sizzle, ignite the imagination and stir up the senses!

### *Halifax Citadel National Historic Site of Canada*

By any criteria or definition the Halifax Citadel is a very 'special place'. The Halifax Citadel has been commemorated as a nationally significant symbol of Halifax's role as a principal naval station in the British Empire and of the city's importance to Canada's development and evolution from colony to nation. The Halifax Citadel was formally recognized as a significant symbol of Canadian nationhood when it was designated as a National Historic Site in 1951.



### *Fort Anne National Historic Site of Canada*

Fort Anne National Historic Site of Canada is Canada's oldest - a present day reminder of a time when conflict between Europe's empire builders was acted out on the shores of the Annapolis River. It offers a sweeping view of the beautiful Annapolis Basin from the centre of Annapolis Royal. Museum exhibits highlight the history of the fort.

### *Kejimikujik National Park and National Historic Site of Canada Natural Wonders & Cultural Treasures*

A unique gem in the Parks Canada system, Kejimikujik National Park and National Historic Site of Canada protects 381 square kilometres of inland lakes and forests, and 22 square kilometres of rugged Atlantic coastline in Kejimikujik Seaside. Kejimikujik is also a national historic site, commemorating 4,000 years of Mi'kmaw history, and is home to one of the largest collections of rock carvings, or petroglyphs, in eastern North America. The Park and surrounding area provide habitat and an opportunity for ongoing research for species at risk, including the Blandings turtle and water pennywort.



Kejimikujik, best known to canoeists and campers, is a gently rolling landscape where turtles bask along slow-moving rivers, and white-tailed deer slip silently through tranquil forests. For thousands of years, the Mi'kmaq canoed along these connecting waterways, and set up hunting and fishing camps along the shores.

Today, you can explore Kejimikujik's forests and waterways at your own pace. Bring the family for an afternoon paddle up the Mersey River, relax on Merrymakedge Beach, swim in the warm waters of Kejimikujik Lake or hike a woodland trail.

### *Casino Nova Scotia - The Schooner Showroom*

Some of the world's brightest stars have lit up the stage at Casino Nova Scotia's Schooner Showroom! Dionne Warwick, KC & The Sunshine Band, The Village People, America, Randy Bachman, Joan Rivers, Boyz II Men, Don McLean and Tom Cochrane are among the past performers!

The intimate Schooner Showroom offers something for everyone including national and international singers, hilarious comedy, action packed boxing and world renowned theater performances.

Purchase Tickets in advance by calling 1-888-6GAMES6 or 902.425.7777, or in person at the Casino Box Office at Casino Nova Scotia. Tickets for select shows are now available at the Ticket Atlantic Box Office, charge by phone 902.451.1221, at all participating Atlantic Superstores and on line at [www.ticketatlantic.com](http://www.ticketatlantic.com) Major credit cards accepted, service charges apply.

Not all Casino Nova Scotia events are available through Ticket Atlantic, look for the Ticket Atlantic logo.



## Sail aboard a legend - Bluenose II

Smell the salt air and feel the breeze on your face as you sail around the harbour on your own tall ship cruise and view Nova Scotia's stunning coastline from the water.

This famous 143-foot, 75-passenger capacity schooner is a faithful replica of the original Bluenose that was launched in 1921. Like its namesake, Bluenose II sails out of Lunenburg, a beautifully preserved UNESCO World Heritage site, and visits Halifax and other ports throughout the province and the world.

Between June and September, two-hour harbour cruises are open to the public. You are invited on board this great Nova Scotia attraction. Tickets are available by reservations. For sailing times, visit Bluenose II sailing schedule.



## Visit the oldest working brewery in North America - Alexander Keith's

For a true Nova Scotia good time, take an informative and interactive tour of the Alexander Keith's Nova Scotia Brewery. Actors in period costume will lead you back in time as you learn about the beer, the brewery and life in Halifax in 1863. Visit the Stag's Head Tavern where you will listen to toe tapping music, play games and of course sample Keith's fine ale. It's the perfect tour for people of all ages!

Downtown Halifax offers a unique blend of old pubs and new bars creating a night-life unlike any other in North America. Add to this our reputation as the center of the East Coast music scene and you are in for the night of your life! Start out your evening with an hour long tour of the Keith's Brewery. Actors in period costume will provide you with a look at Keith's Brewery in the year 1863 before you visit the Stag's Head Inn and listen to some toe-tapping music while enjoying samples of Mr. Keith's finest ales. You choose how the rest of your evening goes. Whether you want Celtic or Classical - we can find the right place for you.

## Go for a stroll on Halifax's Historical Downtown Walk

On this 2 to 3 hour walk around Halifax you will see Neptune Theatre, Discovery Centre, Halifax City Hall, Art Gallery of Nova Scotia, Province House, Halifax Metro Centre, Royal Nova Scotia International Tattoo, Nova Scotia Sport Hall of Fame, NSCAD University, Casino Nova Scotia, NovaScotian Crystal, Halifax International Busker Festival, Maritime Museum of the Atlantic, HMCS Sackville, Bishop's Landing, Nova Scotia Centre for Craft and Design, Pier 21 National Historic Site, Farmer's Market, Alexander Keith's Nova Scotia Brewery, Halifax Citadel National Historic Site of Canada, Museum of Natural History, Dalhousie University, University of King's College, Point Pleasant Park, Martello Tower, Shakespeare by the Sea, Saint Mary's University.

For directions to follow and a complete list of things you will see along your journey please go to: <http://visitors.halifax.ca/historic-halifax.shtml>

