

# RECAPITALIZE YOUR FINANCIAL PLAN

**Marriott**  
OTTAWA

Register now for Early Bird Savings and a chance to Win 1 of 2 Free Conference Trips!\*

## Three educational streams:

- Risk Management and Estate Planning
- Wealth Accumulation and Income Tax Planning
- Retirement Planning

## CONFERENCE HIGHLIGHTS:

- Two-and-a-half days of information packed sessions
- Top technical speakers on advanced financial topics, sales and practice ideas
- Earn 20 FPSC verifiable CE credits, 20 Insurance credits or 10 IIROC credits
- Tradeshow Exhibition (two-and-a-half days)
- Outstanding special events & networking opportunities
- Great Companion Program that includes all meals and conference events
- Great evening events

## OTTAWA MARRIOTT HOTEL HIGHLIGHTS:

- Luxurious Ottawa accommodations including 472 hotel rooms and 8 spacious Ottawa suites
- Executive guest rooms offer over-sized accommodations with views of Ottawa and the Gatineau Hills
- Kent Club – Cardiovascular equipment, free weights, ellipticals, treadmills, bikes, stairmasters, rowing
- Kent Club Pool (Indoor & Heated) – Sauna, Large indoor pool with aquatic toys and boards available for children
- Games Room – Air Hockey, Pool table, Xbox 360, Wii consoles, Foosball
- Kids' Zone – Xbox 360, Wii consoles and free WiFi. Indoor treehouse, mini-putt and floor hockey

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

## CIFPs 9<sup>th</sup> Annual National Conference - 2011

**Ottawa Marriott Hotel**  
100 Kent Street, Ottawa, ON K1P 5R7

June 5<sup>th</sup> - 8<sup>th</sup>, 2011

## RECAPITALIZE YOUR FINANCIAL PLAN

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

*The CIFPs 9<sup>th</sup> Annual National Conference  
Be a Delegate*

*Register now for the best prices:*

	Before April 15 <sup>th</sup>	After April 15 <sup>th</sup>
◦ Member price	\$620.00 CAD	\$720.00 CAD
◦ Become a member and attend the conference	\$770.00 CAD	\$870.00 CAD
◦ Non-Member price	\$870.00 CAD	\$970.00 CAD
◦ Companion Program (All Dates)	\$300.00 CAD	\$300.00 CAD
◦ Pre-Conference Workshop (How to achieve new client momentum)	\$395.00 CAD	\$495.00 CAD

### Ask about our special group prices!

13% HST will be added to the registration fee.

\* Free Conference Trip includes travel, accommodation and conference registration.



**CIFPs 9<sup>th</sup>  
ANNUAL  
CONFERENCE**

**2011**

**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 at: 1-866-933-0233 or <http://www.CIFPs.ca/Conference> or by completing the enclosed registration form and faxing it to 647-723-6457

**More reasons to attend**

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

**A great Companion Program**

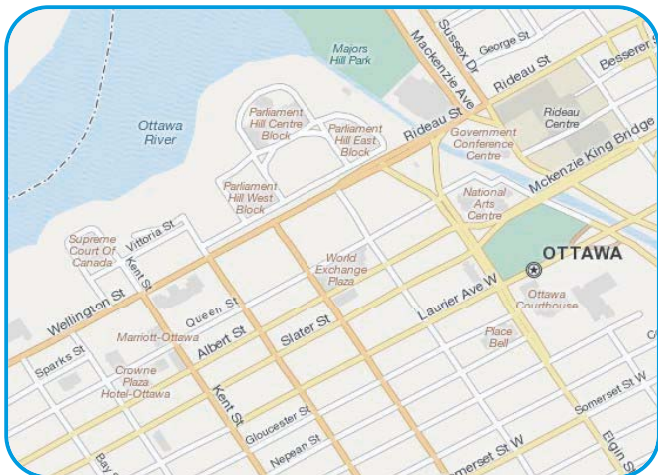
- Program includes all meals, events and sessions at a great rate

**Pre-Conference Workshop**

*How to achieve new client momentum*

- In this one day pre-conference workshop, on Sunday June 5<sup>th</sup> from 8:30am to 4:30pm, Dan Richards will help advisors develop a practical plan to attract new clients.

**Map of the Area**



Thomas Hockin recently became a Director at the International Monetary Fund (IMF). He previously worked as Chair of the Expert Panel on Securities Regulation for the Government of Canada. He is currently a Corporate Director, Chair of a Canadian bank, and serves on various mutual fund independent review committees. Prior to that from 1994 to 2006, he was President and CEO of The Investment Funds Institute of Canada and of The Canadian Institute of Financial Planning. 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-Kwinter 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. Before entering public life he was a Professor at the Ivey School of Business, a teaching fellow at Harvard University and President of Sotheby's Canada. He is the author of 4 books and several scholarly articles. He was awarded an Honourary 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.

» **Glen Hodgson, M.A., Ph.D.**

*Senior Vice President and Chief Economist - The Conference Board of Canada*  
**The Recession, the Recovery and the Future: What it All Means for You**



Mr. Hodgson is responsible for overseeing the Board's macro-economic outlook products, tourism, custom research and conferences programs. He is the Board's chief spokesperson on economic issues, has written extensively on Canadian and international economic and financial issues, and is bilingual. Mr. Hodgson has an M.A. in Economics from McGill University and pursued Ph.D. studies at McGill.

He plays a central role in enhancing the Board's public policy analysis. He is the editor and a contributing author of the book *Crisis and Intervention: Lessons from the Financial Meltdown and Recession*, published in November 2010. Glen is launching the Board's latest research initiative, the Canadian Alliance for Sustainable Health Care (CAHSC). He took the lead in creating the Board's International Trade and Investment Centre and has published over 140 articles and briefings. He is co-authoring a new series of briefings on the economics of pro sports in Canada.

» **Kelley Keehn**

*Financial Expert, Author, Speaker, and Financial Host of Burn My Mortgage*  
**You Inc. for Financial Professionals**

Kelley Keehn is a financial expert, speaker, media personality, and author of seven books, including *The Money Book*, *She Inc.*, *The Woman's Guide to Money* and *The Prosperity Factor for Kids*. She was in the financial industry for twelve years and since leaving her advisory capacity in 2005, has been on a mission to make Canadians feel good about money.

Kelley appears on TV and radio around the globe and has had many regularly published columns and articles. She was a regular contributor for CNBC (New York), a nationally syndicated columnist with CBC radio and in 2009, was quoted in Oprah's *O Magazine*.

Today she is proud to be the financial host of W Network's *Burn My Mortgage*, a weekly columnist for the *Globe & Mail* and AOL's *WalletPop Canada*, and travels across the country speaking to some of Canada's largest corporations.



» **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 IROC credits.

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

## Parliament Hill

The seat of Canada's federal government and the setting for national celebrations the year round, Parliament Hill is the most visited Ottawa attraction. The Parliament Buildings are set on a dramatic hill overlooking the Ottawa River. The grounds of Parliament Hill are dotted with numerous sculptures of important Canadians. Guided tours take visitors through public galleries, to the Senate and House of Commons (when not in session) and to the top of the Peace Tower, where an observation deck provides the most dramatic 360° view of the Capital. Each morning during summer months, the front lawn of Parliament Hill is the setting of the daily Changing the Guard ceremony; each evening the public is invited to gather again to witness the awe-inspiring Sound and Light show - spectacular lighting effects and stunning giant images projected on the Parliament Buildings set to words and music. Both events are free. Truly a must-see!



## Rideau Canal - UNESCO World Heritage Site



An historic waterway filled with boaters, spring through fall, and the world's largest naturally frozen skating rink in winter – the Rideau Canal winds through the heart of Ottawa before connecting with the Ottawa River through dramatic stepped locks right next to Parliament Hill. The Rideau Canal stretches from Ottawa and the Ottawa River 202 kilometres south to Lake Ontario and the St. Lawrence River at Kingston, connecting beautiful lakes and rivers through a series of 45 locks. The Canal is both a National Historic Site of Canada and a UNESCO World Heritage Site. May through early October, the Canal is open to sightseeing cruises, pleasure craft, canoeist, and kayakers; paddleboats, canoes and kayaks can be rented at the Dow's Lake Pavilion.

## Ottawa Museums and Galleries

Ottawa museums and galleries invite visitors to experience the best of Canada all in one place. If interested in seeing many of these, you may want to consider a museum passport, for more information on this, please check out [www.museumspassport.ca](http://www.museumspassport.ca)

- » The stunning National Gallery of Canada presents the country's national art collection and outstanding international exhibitions throughout the year. Located just steps from Parliament Hill in downtown Ottawa, the National Gallery of Canada is the country's showcase of the visual arts and a spectacular architectural landmark.
- » The incomparable Canadian Museum of Civilization celebrates Canadian and world cultures, and houses the world's largest indoor collection of totem poles in its beautiful Grand Hall. Located on the shores of the Ottawa River directly across from Parliament Hill, the Canadian Museum of Civilization is a stunning landmark building that celebrates the achievements and histories of Canadian and world cultures.
- » The Canadian War Museum pays tribute to the country's military past, while the unique Diefenbunker, Canada's Cold War Museum, presents a look at a chilly time in international relations.
- » The Canada Aviation and Space Museum proudly displays one of the world's finest collections of aircraft. Located east of downtown along the Ottawa River Parkway, the Canada Aviation and Space Museum houses one of the world's finest collections of military and civilian aircraft inside its giant hangar-like walls.



## Other things to do

- ▶ Looking for dinosaurs or other larger than life exhibits? Head to the Canadian Museum of Nature. Located in the castle-like Victoria Memorial Museum Building a pleasant stroll south of Parliament Hill, the Canadian Museum of Nature brings our natural heritage indoors for a close-up and fascinating look.
- ▶ Into science? Check out the Canada Science and Technology Museum. Trains, planes and automobiles - with plenty of gadgets, a crazy kitchen and a hair-raising static ball in between - the Canada Science and Technology Museum, located in east Ottawa, is the place for scientific discovery and fun.
- ▶ Interested in money? Visit the Royal Canadian Mint and the Currency Museum. Located next to the National Gallery of Canada, the Royal Canadian Mint is one of the world's most respected manufacturers of collector and commemorative coins, gold bullion coins, medals and medallions. Located just down the street from Parliament Hill on Ottawa's Sparks Street Mall, the Currency Museum of the Bank of Canada offers a fascinating look at something that interests most of us - money. Admission to the Museum is free!
- ▶ And for the complete story behind the building of the Rideau Canal – a UNESCO World Heritage Site – stop by the Bytown Museum, nestled next to the Canal locks downtown. Nestled beside the Rideau Canal locks below Parliament Hill and adjacent to the Ottawa River, the Bytown Museum traces the early history of Ottawa, with a special focus on the construction of the Rideau Canal.



## Ottawa Tours and Sightseeing

Ottawa is filled with Capital sights and attractions – and just about as many ways to explore and see them.

- ▶ For traditionalists, there are sightseeing bus tours available from Gray Line of Ottawa and Lady Dive Tours.
- ▶ The Rideau Canal and Ottawa River afford great views of the Capital from the decks of cruise boats from Capital Cruises and Paul's Boatlines.
- ▶ For those who want both a bus and boat experience, amphibious tours are offered by Lady Dive.
- ▶ All-aboard the Hull-Chelsea-Wakefield Steam Train – one of Canada's last remaining authentic steam-trains. Enjoy the climb through the Gatineau hills to the picturesque village of Wakefield.
- ▶ For a street-level view of Ottawa, climb aboard Ottawa Rickshaws. And on foot, you can experience the frights with Haunted Walks. Another place you may want to walk around is ByWard Market just east of Parliament Hill, this historic farmers' market and shopping district by day, a favourite gathering place of restaurants and clubs by night is one neighbourhood you won't want to miss.



## Ottawa Festivals and Events

Ottawa is a city of celebration, offering visitors a year-round calendar of festivals and special events. While there for the conference you might be interested to see:



Every year, the Ottawa International Children's Festival holds a five-day extravaganza of the finest quality theatre, dance and music for young audiences in our community. We create programs for children of all ages focused on enriching school curriculum and promoting the arts as an integral part of children's education. We have hosted performers from Brazil, Kenya, Peru, Holland, France, England, Germany, Denmark and China, as well as artists from

across Canada. Join us from June 1-5 for an amazing performing arts experience that will excite and amaze the whole family! Check out [www.ottawachildrensfestival.ca](http://www.ottawachildrensfestival.ca) for more Festival information.

The Magnetic North Theatre Festival is your chance to see fantastic productions from all across Canada, meet national and international presenters, and mingle with great Canadian artists. We bring some of the most exciting productions of English theatre on tour in Canada to your front door! Magnetic North is coming to Ottawa June 3-11! Check out [www.magneticnorthfestival.ca](http://www.magneticnorthfestival.ca) for more Festival information.



Please check out [www.ottawatourism.ca](http://www.ottawatourism.ca) for a complete list of attractions and things to do around Ottawa.



## 9<sup>th</sup> Annual National Conference - 2011

**Dates:** Sunday, June 5<sup>th</sup>, 2011 to Wednesday, June 8<sup>th</sup>, 2011

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

**Location:** Ottawa Marriott Hotel, Ottawa, Ontario



Photo: Harry Foster, MCC

**Marriott**  
OTTAWA

### Flight Information:

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

Book now for the cheapest rates!

### Shuttle Bus Information:

YOW Airporter provides shuttle transportation for individuals and groups traveling between the Ottawa airport and Ottawa area hotels. They provide charter transportation not only between the airport and local hotels, but to any venue in the Ottawa region.

For further information please visit:  
<http://www.yowshuttle.com>

### 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 27 degrees Celsius and a nighttime low of 10 degrees Celsius.

100 Kent Street, Ottawa, Ontario K1P 5R7 Canada  
Tel: 613-238-1122 Toll-Free: 1-800-853-8463

Welcome to the Ottawa Marriott Hotel in downtown Ottawa, a short stroll from Canada's Parliament Buildings, the Rideau Canal, the Ottawa Congress Centre and the National Gallery of Canada. Stay in one of their 480 comfortable and luxurious guestrooms with 37" LCD TVs, the REVIVE® bed or try the newly enhanced Concierge-level guestrooms with contemporary decor and access to a private lounge. Get the whole spin at "spin" Kitchen & Bar, our street-level restaurant. Relax and unwind with their indoor pool, sauna, and exercise facilities featuring treadmills, bikes and ellipticals with personal TVs. Entertain children of all ages in our KIDS' Zone with activity centre, video games, pool table, and indoor mini-putt. You will be moments away from popular Ottawa attractions, including:

- Parliament of Canada
- Byward Market
- National Gallery of Canada
- Canadian Museum of Civilization
- Canadian Museum of Nature
- Rideau Canal
- Gatineau Park
- Casino Lac Leamy
- Changing of the Guard
- Canadian Aviation Museum
- Bytown Museum
- National Archives of Canada
- Diefenbunker



**Room Pricing:** \$179.00 CAD plus taxes per night  
**Hotel Website:** <http://www.OttawaMarriott.ca>

**Please call CIFPs for Hotel Reservations  
at 1-866-933-0233 x128**