

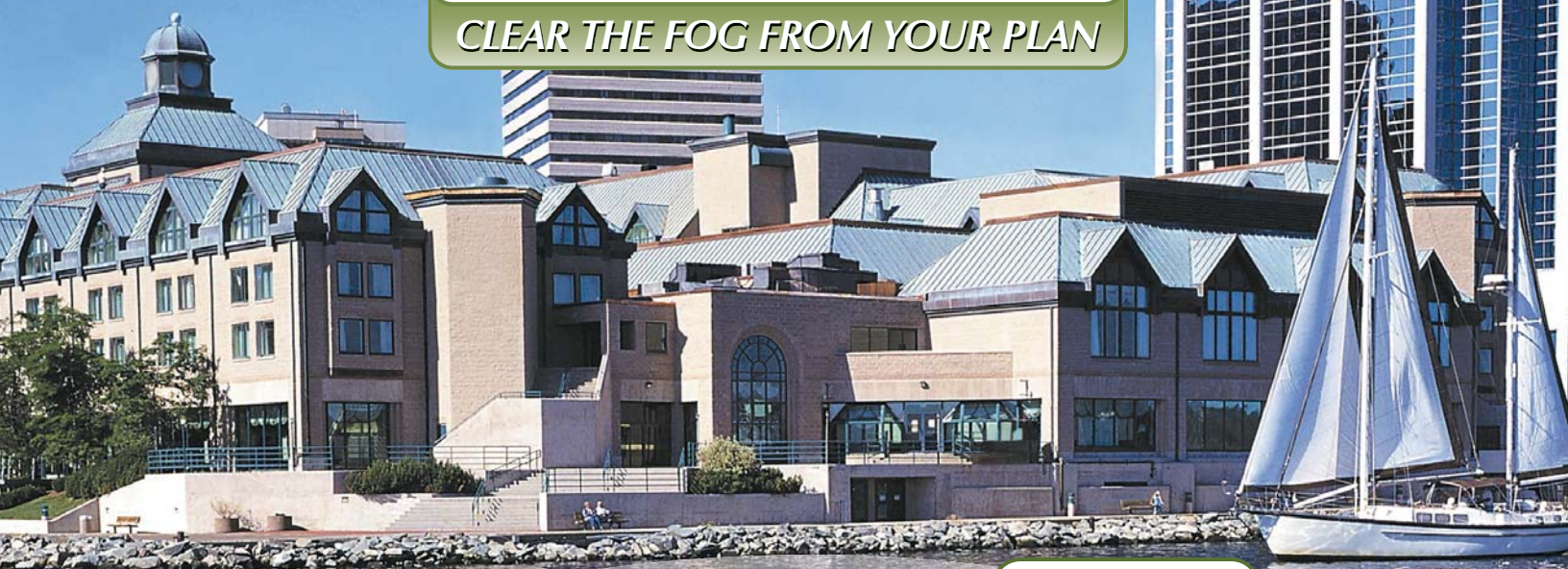
Register now for  
Early Bird Savings!



**12<sup>th</sup> Annual National Conference - 2014**

**Halifax Marriott Harbourfront Hotel  
Nova Scotia - June 8<sup>th</sup> - 11<sup>th</sup>**

***CLEAR THE FOG FROM YOUR PLAN***



**FOUR EDUCATIONAL STREAMS:**

- Risk Management and Estate Planning
- Wealth Accumulation and Income Tax Planning
- Retirement and Life Style Planning *presented by the CIFP Retirement Institute*
- Advanced Financial Planning *presented by CIFPs in association with the Institute of Advanced Financial Planners (IAFP)*

**CONFERENCE HIGHLIGHTS:**

- Two-and-a-half days of information packed sessions
- Top technical speakers on advanced financial topics, sales and practice ideas
- Claim up to 25 FPSC verifiable CE credits<sup>1</sup>, 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

**CONFERENCE HOTEL HIGHLIGHTS:**

A departure from ordinary hotels, Halifax Marriott Harbourfront Hotel allows you to discover unparalleled service and downtown convenience. Overlooking the harbour, it is steps from the business district, World Trade & Convention Centre and casino. Unique amongst Halifax, Nova Scotia, hotels, this hotel positions itself as a downtown destination for business and leisure. From relaxing Interlude Spa treatments to the state-of-the-art fitness center, and other amenities are unmatched among Halifax, NS, hotels. No matter the occasion, Halifax Marriott Harbourfront Hotel is sure to please.

***Featuring...***

**Colin & Deb**



**Susan  
Wolburgh Jenah**



**Greg Smith**



**Michael "Pinball"  
Clemons**



***The CIFPs 12th Annual National Conference***

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

***Register by May 1<sup>st</sup> for Early Bird Prices!***

	Before May 1 <sup>st</sup>	After May 1 <sup>st</sup>
• CIFPs Member price	<b>\$679.00 CAD</b>	\$779.00 CAD
• Become a CIFPs member & attend the conference	<b>\$829.00 CAD</b>	\$929.00 CAD
• Non-Member price	<b>\$979.00 CAD</b>	\$1,079.00 CAD
• Companion Program (All Dates)	<b>\$300.00 CAD</b>	\$300.00 CAD

**Ask about our special group prices!**

15% HST will be added to the registration fee.

***Register via [www.CIFPs.ca](http://www.CIFPs.ca) or Call us at 1-866-933-0233, option 2 for early bird specials***

1 - CIFP/CIFPs creates and/or sponsors its educational offerings in consideration of the continuing education guidelines set by the Financial Planning Standards Council (FPSC). It is the responsibility of the CFP professional to assess the appropriateness of this education content for purposes of claiming CE credits. Claims for CE credits are subject to review and approval by FPSC. 2 - To be eligible to win 1 of the 5 random draws for a Free Conference Trip (which includes your flight, up to 5 nights in the conference hotel and your conference registration) you must be registered for the conference and the conference hotel by April 15<sup>th</sup>, 2014. CIFPs reserves the rights to select which flights are eligible with this promotion. 3 - To be eligible to win 1 of 20 random draws for a Free Conference Registration you must be registered for the conference by April 15<sup>th</sup>, 2014.





Colin Mochrie is an alumnus of Toronto's famous Second City comedy troupe and is widely considered to be one of the leading improvisers in the world. In 2013, Colin Mochrie was named Canadian Comedy Person of the Year at the Canadian Comedy Awards.

After nine years as a regular on the British improvisation series *Whose Line is it Anyway?*, he became a regular on the American version hosted by Drew Carey, which ran for six years on ABC and three years on ABC Family. In 2011, the entire cast was reunited in Vegas for Drew Carey's *Improv-aganza*, a new series which aired for one season on GSN. A new hit version of *Whose Line is it Anyway?*, featuring Colin, Wayne, Ryan, and new host Aisha Tyler, is currently airing on the CW Network. Launched in July of 2013 with 12 episodes, it has subsequently been renewed for a second season with an order of 24 more shows to air in 2014.

Deb, a graduate from Ryerson theatre, honed her comedy skills at the famed Second City in Toronto where she met her husband Colin Mochrie. They moved to L.A. when she co-created a show called *My Talk Show*. Since then, Deb has done a myriad of TV, film, animation and ads. Her work of late has included, *Little Mosque on the Prairie* where she plays the Mayor, *Single White Spenny*, the voice of *Winners*, *The Ron James Show*. Deb was also nominated for an Actra Award for the movie *Expecting* and has been inducted into the Scarborough Walk of Fame, a proud moment for this former Scarborough girl.

Deb created, co-wrote, produced and starred in CBC's *Getting Along* Famously with her husband Colin. Together they have also played a husband and wife in *Love Letters* and *Sunshine* sketches of a *Little Town* for CBC, and *Living in my Car*. Deb has just co-created a pilot called *Filling the Gaps* with Colin and her writing partner Barbara Radecki. With Barb she created a labour of love-their blog <http://themiddle-ages.blogspot.com> Last year she and Barb were nominated as one of the 100 most influential bloggers in North America.

# CIFPs 12<sup>th</sup> ANNUAL CONFERENCE

2014

## Preliminary Agenda

## REGISTRATION INFORMATION

### Register NOW for the best rates!

- Conference registration includes admission to all keynote addresses, breakout educational sessions, exhibits, meals, the welcome reception and dinner and all conference materials
- Register at: 1-866-933-0233, option 2 or <http://www.CIFPs.ca/Conference> or by completing the enclosed registration form and faxing it to (647) 723-6457

### Continuing Education Credits

- Attending the conference and completing the related quizzes will allow you to claim up to 25 FPSC verifiable CE credits (pre-approval pending), 20 Insurance credits or 10 IIROC credits.

The CIFPs Conference is based on continuing education guidelines set by Financial Planning Standards Council (FPSC). It is the sole responsibility of the CFP® professional to assess the appropriateness of his or her CE activities in accordance with these guidelines.

### More reasons to attend

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

### CIFPs Companion Program

- A great way for your spouse and/or adult children to also enjoy our Conference
- Program includes all meals, events and sessions at a special rate

### Map of the Area



### » Susan Wolburgh Jenah

*President & CEO - Investment Industry Regulatory Organization of Canada (IIROC)*



Susan Wolburgh Jenah is President and Chief Executive Officer of the Investment Industry Regulatory Organization of Canada (IIROC), a position she has held since the regulator was established in June of 2008.

Ms. Wolburgh Jenah was appointed President and CEO of the Investment Dealers Association of Canada (IDA) in June 2007 and was responsible for leading the merger of the IDA and Market Regulation Services Inc. (RS) to form IIROC. Before joining the IDA, Ms. Wolburgh Jenah served as Vice Chair of the Ontario Securities Commission from 2004-2007 and as Acting Chair of the Commission from July to November 2005. Prior to her appointment as Vice Chair, she served as General Counsel and Director of International Affairs, representing the Commission on various Committees of the International Organization of Securities Commissions (IOSCO).

### » Greg Smith

*Wall Street Insider and Former Goldman Sachs Executive*



On March 14, 2012, more than three million people read Greg Smith's bombshell Op-Ed in *The New York Times* entitled "Why I Am Leaving Goldman Sachs." The column immediately went viral, became a worldwide trending topic on Twitter, and drew passionate responses from politicians, business leaders and commentators. Mostly, though, it hit a nerve among the general public who question the role of Wall Street in society — and the callous "take-the-money-and-run" mentality that brought the world economy to its knees a few short years ago.

### » Michael 'Pinball' Clemons

*CFL Legend | Toronto Argonauts Vice-Chairman*



To Canadians, the name "Pinball" stands for remarkable athletic talent, outstanding sportsmanship and a commitment to the community.

As a former all-star running back, Grey Cup winning coach, President and CEO, and now the Vice-Chair for the Toronto Argonauts, Michael "Pinball" Clemons is a man of unquestionable character and spirit. He is equally renowned for his achievements on the football field as he is for his impact as a motivational speaker.

Pinball's presentations are at once captivating and empowering. He inspires audiences by demonstrating what it means to beat the odds and encourages listeners to use teamwork to achieve their goals.

## *Other things to do*

There is so much to see and do in Halifax no matter what time of year you are travelling. Halifax is rich in history, culture and friendly people. We have provided a few things to see and do while visiting Halifax.

### ART GALLERY OF NOVA SCOTIA

Nova Scotia's largest art gallery displays a wide range of local, national and touring exhibitions, from traditional folk art to innovative contemporary works. Continuing through July 18: Looking Out to Sea. Works from the printmakers, draughtsmen and watercolourists who recorded the activity of the Canadian navy in Halifax. Continuing: Show of Hands. A survey of Nova Scotian folk art. Website: <http://www.artgalleryofnovascotia.ca>



### ALEXANDER KEITH'S NOVA SCOTIA BREWERY

Visit Canada's oldest working brewery (dating back to 1820). A historic downtown landmark, the massive granite building offers sights, smells and tastes to delight beer lovers and history buffs. Costumed interpreters guide take visitors back in time. Open daily, May through October; open weekends year-round. Website: <http://keiths.ca>

### NOVA SCOTIAN CRYSTAL

Canada's only maker of fine, mouth-blown, hand-cut crystal is located on the waterfront. It's well worth a trip to the glassworks to watch master craftsmen work their magic, turning molten sand into crystal. Visit the showroom and see the complete collection of these works of art. Showroom open daily, May through December; closed Sundays in winter. Glassworks operates Monday to Friday year-round. Shipping is available. Website: <http://www.novascotiancrystal.com>

### PEGGYS COVE

The famous lighthouse, perched atop spectacular granite boulders worn smooth by the pounding waves, dominates this rugged fishing community. The raw power and beauty of nature is breathtaking, making this spot Nova Scotia's premier tourist attraction. But be careful—the rocks are slippery and the waves are dangerous. Restaurants, craft and souvenir shops and accommodations are all available in the immediate area. Rte. 333, 44 kilometres west of Halifax. Website: <http://www.peggyscoveregion.com>



### HALIFAX CITADEL NATIONAL HISTORIC SITE

Completed in 1856, the present Citadel is the fourth in a series of forts since 1749 to occupy the hill overlooking the harbour. Although never attacked, the fort was occupied by the British army until 1906 and by Canadian forces during the world wars. Now operated by Parks Canada, the Citadel is one of Canada's most visited National Historic Sites. Open May 7 to October 31. Grounds open year-round (no services in off-season). Average duration of visit: three hours. Website: <http://www.regimental.com>

### CANADA'S IMMIGRATION MUSEUM AT PIER 21

Visit "Canada's immigration museum" to follow in the footsteps of the 1.5 million immigrants and Canadian military personnel who passed through Pier 21 between 1928 and 1971. Explore stories of immigration and nation-building through interactive exhibits, multimedia presentations and activities for all ages. A research centre, gallery, café and gift shop are located on site. Website: <http://www.pier21.ca>



STILL LOOKING FOR MORE TO DO, TRY BUILDING YOUR OWN ITINERARY AT: <http://www.destinationhalifax.com>



# CIFFPs 12<sup>th</sup> Annual National Conference - 2014

Claim up to 25 FPSC verifiable CE credits<sup>1</sup> (pre-approval pending), 20 Insurance credits or 10 IIROC credits.

Sunday, June 8<sup>th</sup>, 2014 to Wednesday, June 11<sup>th</sup>, 2014

Halifax Marriott Harbourfront Hotel, Nova Scotia



## Flight Information:

WestJet and Air Canada fly to Halifax from all of the major Canadian cities, and the smaller airlines such as Porter fly to Halifax from the major cities on the eastern side of Canada.

Book now for the cheapest rates!

## Shuttle Bus Information:

Delegates of the CIFFPs conference receive a 10 % discount from Halifax Airport Express.

Use Coupon Code: CIFFPs062014

For further information please visit:  
[www.halifaxairportexpress.com](http://www.halifaxairportexpress.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.

## Weather:

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

## Conference Hotel Information:

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 Alexander Keith's Brewery Tour
- o Art Gallery of Nova Scotia
- o Bedford Institute of Oceanography
- o Black Cultural Centre for Nova Scotia
- o Bluenose II
- o Casino Nova Scotia
- o Citadel Hill
- o Dalhousie University
- o Discovery Centre
- o Granite Brewery
- o Granite Spring Golf Club
- o Halifax Metro Centre
- o Historic Properties
- o Kartbahn Indoor Karting
- o Maritime Museum of the Atlantic
- o Nova Scotia Museum of Natural History
- o Pier 21
- o Titanic memorial and cemetery

Halifax Marriott Harbourfront Hotel  
1919 Upper Water Street, Halifax, Nova Scotia B3J 3J5 Canada  
Tel: 902-421-1700 Toll-Free: 1-800-943-6760

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

Standard Room Pricing: \$229.00 CAD plus taxes per night

Please call CIFFPs for Hotel Reservations  
at 1-866-933-0233, option 2

**Marriott**  
HALIFAX  
HARBOURFRONT



# 12<sup>th</sup> Annual National Conference - 2014

## CORPORATE DIAMOND SPONSORS



## CORPORATE PLATINUM SPONSORS



## STRATEGIC PARTNER SPONSORS



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# Conference Registration



## CIFPs 12<sup>th</sup> ANNUAL NATIONAL CONFERENCE - 2014

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Halifax Marriott Harbourfront Hotel  
Nova Scotia - June 8<sup>th</sup> - 11<sup>th</sup>

Register by May 1<sup>st</sup>, 2014 to receive the lowest price

Please complete and send by mail or fax with payment to: **The Canadian Institute of Financial Planners "CIFPs"**  
c/o CIFPs, 3660 Hurontario Street, Suite 600, Mississauga, ON L5B 3C4 Fax: 647-723-6457  
or call us at 1-866-933-0233, option 2 or register via our website: [www.CIFPs.ca](http://www.CIFPs.ca)

### General information

Membership #:

Mr.  Mrs.  Ms.

First name

(as you wish it to appear on your name badge)

Surname

Designations (check all that apply)  CFP®  CLU  CH.F.C.  RHU  RFP  FCSI  Other: \_\_\_\_\_

CERTIFIED FINANCIAL PLANNER® Registrant #: \_\_\_\_\_ I have been in the financial planning profession for \_\_\_\_\_ years.

If certified, would you like your Conference name badge to identify you as a CFP® professional?  Yes or  No

Company: \_\_\_\_\_ Street address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal code: \_\_\_\_\_

Telephone bus./home: \_\_\_\_\_ E-mail: \_\_\_\_\_ Fax: \_\_\_\_\_

Check this box if you do not wish to share your contact information on this form with sponsors and exhibitors. No other information will be released.

Companion program:  Yes  No  Companion name: \_\_\_\_\_

How did you hear about this event?  CIFPs Mailing  Word of Mouth  Website  Brochure  Email  
 Investment Executive Advertisement  Insurance Journal Advertisement  
 Other: \_\_\_\_\_

Please indicate special dietary requirements: \_\_\_\_\_

### Registration rates

Register now for the best prices (contact CIFPs for group and corporate rates):

	Early Bird by May 1 <sup>st</sup> , 2014	Standard Rates
Member	<input type="checkbox"/> \$679.00 CAD	<input type="checkbox"/> \$779.00 CAD
Become a member and attend the conference	<input type="checkbox"/> \$829.00 CAD	<input type="checkbox"/> \$929.00 CAD
Become a member (not attending conference)	<input type="checkbox"/> \$299.00 CAD	<input type="checkbox"/> \$299.00 CAD
Attend the conference as a non-member	<input type="checkbox"/> \$979.00 CAD	<input type="checkbox"/> \$1,079.00 CAD
COMPANION TICKETS: Includes all meals, events and sessions. (all dates)	<input type="checkbox"/> \$300.00 CAD	<input type="checkbox"/> \$300.00 CAD

### Payment information

- Registration will not be processed without full payment.
- We cannot invoice for payment.
- 15% HST from NS is applicable to conference and companion registration.
- When applicable, GST/HST/QST based on your province of residence will be applied to the CIFPs membership portion of the registration fee.

Subtotal \_\_\_\_\_

Please add 15% HST \_\_\_\_\_

Total \_\_\_\_\_

### Payment method

VISA  MASTERCARD  AMEX  Cheque (payable to The Canadian Institute of Financial Planners "CIFPs")

I hereby authorize CIFPs to charge my credit card for the registration fees plus applicable taxes.

Card number: \_\_\_\_\_ Expiration date: \_\_\_\_\_

Cardholder's name: \_\_\_\_\_ Cardholder's signature: \_\_\_\_\_

### Cancellation policy

- Substitutions may be made at any time by faxing a written request to the attention of CIFPs 12<sup>th</sup> Annual National Conference 2014 at 647-723-6457.
- Cancellation requests must be received in writing by April 15<sup>th</sup>, 2014. No refunds will be given for cancellations received after April 15<sup>th</sup>, 2014, instead a credit towards CIFPs 13<sup>th</sup> Annual National Conference 2015 will be issued.