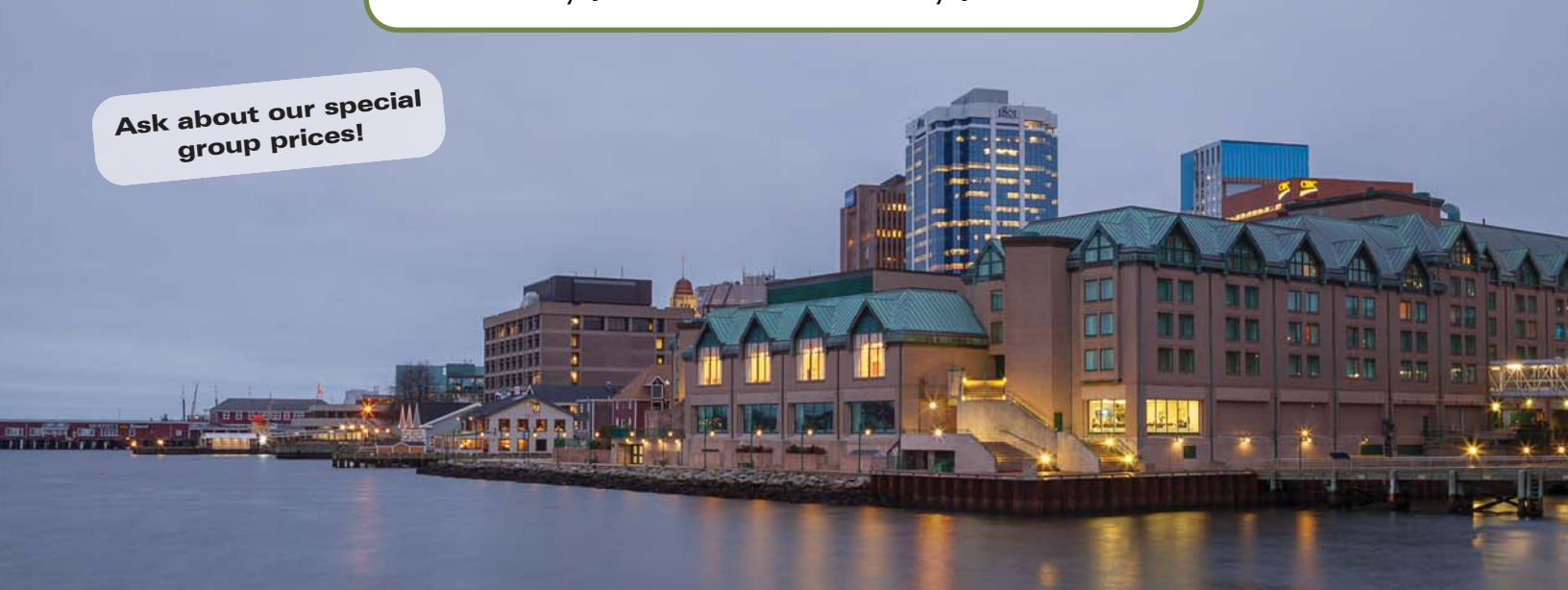




16th Annual National Conference - 2018
Halifax Marriott Harbourfront – Nova Scotia
Sunday June 10th - Wednesday June 13th



Ask about our special group prices!



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

Education-based Financial Planning Conference featuring:

- Two-and-a-half days of topical, informative sessions
- Top technical speakers on advanced financial topics, sales and practice ideas
- Claim up to 25 FPSC verifiable CE credits¹ (including 1 professional responsibility CE credit), 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

Register by April 13th to receive the lowest price!



Rex Murphy



Dr. Jack Mintz



Dr. Meir Statman



Greg Johnson

Educational Streams Focusing On:

- **Retirement and Lifestyle Planning**
presented by the CIFP Retirement Institute
- **Risk Management**
- **Advanced Financial Planning**
featuring four higher level lectures with original supplemental study materials offering the potential for additional CE credits.

Topics Include:

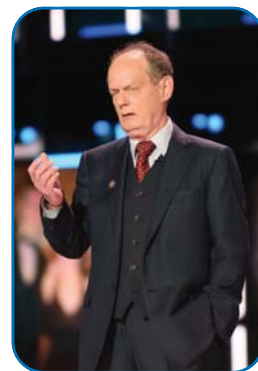
- **Intergenerational Wealth Transfers:**
Having the Conversation with Clients
- **Current Trends and Issues in Financial Planning**
- **The New Paradigm for Private Corporations**
- **Trade: Canada's Options in the Face of Increased Protectionism**
- **Tax Planning for Your Clients**
by Carolyn M. Fallis, MTax, CPA, CA, CFP®, Fellow of FPSC
- **Socially Responsible Investing**
by Dr. Carol Pomare, PhD, DBA

Register via 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 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. Claim for 25 Verifiable CE credits includes completion of at least one CE title from the Advanced Financial Planning Stream. All claims are subject to review and approval by FPSC.

Canadian's are treated to weekly commentary from Rex on CBC's The National along with his Saturday column in the National Post. He's also acted as an editorial contributor to CBC Radio's Definitely Not the Opera For over 20 years he was the host and moderator of CBC Radio's Cross Country Checkup The show brought over 1 million listeners and at times 15,000 callers wanting to join in discussions.

A Rhodes scholar, Rex was born and raised in St. John's, Nfld., where he graduated from Memorial University. In 1968, he went to Oxford University, along with former U.S. President Bill Clinton. Rex later ran twice in provincial elections and lost both times. Maybe he was too honest?



CIFPs 16th ANNUAL CONFERENCE

2018

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 <https://www.CIFPs.ca/Conference>

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 children to also enjoy our Conference
- Adult Program includes all meals, events and sessions at a special rate (optional)
- Child Program includes all meals and events at a special rate (optional)

Map of the Area



» Dr. Jack Mintz

World-Renowned Economist, Academic & Public Policy Analyst



Dr. Jack Mintz believes economists shouldn't be afraid to explain economic facts while providing a view on policy. His public presence has helped sparked debates within governments around the world. Serving on several corporate boards and engaged by many large multinational enterprises, Dr. Mintz has extensive experience solving complex business problems and advising on strategic direction to corporations around the world.

He is the chair and Vice-President of the Social Sciences and Humanities Research Council of Canada in addition to the role of National Policy Advisor for the accounting firm EY. He serves as an Associate Editor of International Tax and Public Finance and the Canadian Tax Journal, and is a research fellow of CESifo, Munich, Germany, and the Centre for Business Taxation Institute, Oxford University. Dr. Mintz held the position of Professor of Business Economics at the Rotman School of Business from 1989-2007 and Department of Economics at Queen's University, Kingston, 1978-89. He was a Visiting Professor, New York University Law School, 2007; President and CEO of the C. D. Howe Institute from 1999-2006; Clifford Clark Visiting Economist at the Department of Finance, Ottawa; and Associate Dean (Academic) of the Faculty of Management, University of Toronto, 1993 – 1995.

» Dr. Meir Statman

Glenn Klimek Professor of Finance - Santa Clara University

Meir Statman is the Glenn Klimek Professor of Finance at Santa Clara University. His research focuses on behavioral finance. He attempts to understand how investors and managers make financial decisions and how these decisions are reflected in financial markets. His most recent book is "Finance for Normal People: How Investors and Markets Behave," published by Oxford University Press.



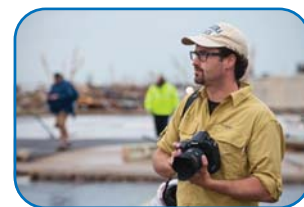
Meir's research has been published in the Journal of Finance, the Journal of Financial Economics, the Review of Financial Studies, the Journal of Financial and Quantitative Analysis, the Financial Analysts Journal, the Journal of Portfolio Management and many other journals. The research has been supported by the National Science Foundation, the Research Foundation of the CFA Institute, and the Investment Management Consultants Association (IMCA).

Meir received his Ph.D. from Columbia University and his B.A. and M.B.A. from the Hebrew University of Jerusalem.

» Greg Johnson

Storm-Chaser & Severe Weather Expert

Greg Johnson, one of North America's top professional storm-chasers and severe weather experts, is also an accomplished photographer, speaker, author and workshop leader. Having graduated from Canada's renowned Acadia University, and after founding and building a leading successful communications, marketing and advertising firm from the ground up, Greg decided it was time to devote himself full-time to pursuing his passion for capturing nature's most beautiful and deadly displays of severe weather.



With over ten years of experience, Johnson enjoys chasing classic prairie thunder and lightning storms, tornados, hurricanes, blizzards, and plans to continue traveling the world year-round to satisfy his appetite for capturing extreme weather. Using sophisticated weather-tracking technology, his ability to read severe weather patterns and a team of dedicated sidekicks, Greg has put over 200,000 kms on his Tornado Truck, intercepting and documenting hundreds of storms across the United States and Canada since 2011 alone. His recent experiences include documenting and compassionately sharing the aftermath of the massive twisters that devastated Joplin Missouri, Moore Oklahoma and El Reno Oklahoma.

IFPs 16th Annual National Conference - 2018

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CORPORATE PLATINUM SPONSORS



STRATEGIC PARTNERS



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CIFFPs 16th Annual National Conference - 2018

Claim up to 25 FPSC verifiable CE credits¹ (pre-approval pending), 20 Insurance credits or 10 IIROC credits.

Halifax Marriott Harbourfront Hotel – Nova Scotia
Sunday June 10th to Wednesday June 13th, 2018



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.

WestJet has offered our delegates a **10% discount**, for details please visit www.CIFFPs.ca/Conference

Book now for the cheapest rates!

Shuttle Bus Information:

Delegates of the CIFFPs conference receive a **10% discount** from Halifax Airport Express. Use Promo Code: **CIFFPS2018**

For further information please visit:
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 online today at :
www.CIFFPs.ca/Conference

Weather:

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

Conference Hotel Information:

A truly special hotel experience awaits you here in Nova Scotia's vibrant capital city. With luxury accommodations, excellent on-site dining and a prime waterfront location, the Halifax Marriott Harbourfront Hotel is an extraordinary destination for both business and leisure travel. Stylishly designed rooms and suites boast pillowtop bedding and marble bathrooms, as well as room service, high-speed internet access and an ergonomic work desk. Begin your day here in Halifax with a cup of coffee and a pastry from the Balancing Rock Coffeehouse, or sample innovative local dining at harbourstone sea grill & pour house or the Stone's Throw Patio. And be sure to treat yourself to a massage at our on-site spa while you're here. The convenient downtown location places the best of downtown Halifax well within your reach.

Halifax Marriott Harbourfront Hotel

1919 Upper Water Street, Halifax, Nova Scotia B3J 3J5 Canada

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

Standard Deluxe Room: \$239.00 per night (plus taxes)

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

Marriott
HALIFAX
HARBOURFRONT

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, now there are plenty more but we will leave those for you to explore.

ART GALLERY OF NOVA SCOTIA

The Art Gallery of Nova Scotia collects, preserves, and exhibits visual arts for the benefit of residents and visitors to Nova Scotia. Over 17,000 works are currently in the Permanent and Study Collection. Exhibitions are planned to shine a light on the region's cultural history and how it connects to the international art historical story.

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>

HALIFAX PUBLIC GARDENS

Opened in 1867, this lush area is one of North America's finest formal Victorian gardens. Its seven hectares include formal floral displays, weeping trees, fountains, roses, magnolias and foliage plants. Ducks and swans splash in the ponds. Duration of visit: about an hour. Main entrance is at the corner of Spring Garden Road and South Park Street. Open daily from May to November, 8am to dusk.

Website: <http://www.halifaxpublicgardens.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>



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>



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>



HISTORIC PROPERTIES

Even longtime residents love to stroll through Historic Properties, so it's a definite must for visitors. Covering three square blocks, this collection of restored heritage buildings includes stone warehouses built to hold privateers' booty at the turn of the 18th century. They were nearly lost to urban renewal but in 1963 were designated a National Historic Site. Now one of the city's most popular visitor destinations, the cobbled courtyards and waterfront boardwalks offer an array of shops, cafés and pubs. Open daily. Website: <http://www.historicproperties.ca>



CANADIAN MUSEUM OF IMMIGRATION AT PIER 21

Pier 21, gateway for nearly 1 million immigrants from 1928 to 1971, now hosts Canada's newest national museum. Hands-on activities, genealogical research, first-person stories. For some of us, our ancestors paved the way. For others, a more recent journey brought us here. At the Canadian Museum of Immigration at Pier 21, you'll experience the moving journey that many families took to start a new life in Canada.

Located at the Halifax Seaport, the Canadian Museum of Immigration at Pier 21 tells the broader story of Canadian immigration, from hundreds of years ago to the present day.

Website: <http://www.pier21.ca>

EXPERIENCE BLUENOSE II

There are many striking images of Bluenose II that have been captured over the years, but none compare to the experience of seeing the real thing. As you walk on deck, you can't help but imagine what it must have been like in the days when fishing schooners were alive with activity, sailing the waters of the North Atlantic. The chance to see and experience Bluenose II is one that's not to be missed.

Website: <http://bluenose.novascotia.ca>



CASINO NOVA SCOTIA

Located on the incredible Halifax Waterfront, Casino Nova Scotia offers exciting gaming, fantastic dining and unforgettable entertainment year-round. They have ample parking and access to most hotels through the pedway system.

Website: <http://www.casinonovascotia.com>

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