Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

CIFPs 6th Annual Conference - 2008

Hilton in the Walt Disney World Resort
Orlando, Florida - May 4th - 7th

Conference Agenda

Sunday, May 4th, 2008

4:30 PM	Registration & Check In
6:00 PM	Cocktail Reception by the Pool sponsored by Standard Life
7:00 PM - 9:30 PM	Opening Dinner sponsored by TD Mutual Funds **Brent Butt** *Comedic Genius Behind Corner Gas*

Monday, May 5th, 2008

6:30 AM	Breakfast sponsored by CI Investments / Sun Life Financial		
7:10 AM	Conference Opening Remarks		
7:45 AM	**Dean Roger Martin**, MBA *Joseph L. Rotman School of Management - University of Toronto* ***The Opposable Mind: How Successful Leaders Win Through Integrative Thinking***		
8:45 AM	**William Hill** *RBC Asset Management Inc.* ***Finding Opportunity in Uncertain Markets***		
9:45 AM	Exhibitor and Refreshment Break sponsored by Standard Life		
10:15 AM	**Terry F. Ritchie**, CFP (US), RFP (Canada), EA (US), TEP *Transitional Financial Advisors Group, Inc.* ***Cross Border Financial Planning***		
11:15 AM - 12:15 PM	**Concurrent Educational Sessions**		
	Dr. Amin Mawani, LLM, Ph.D., CMA, CFP *Associate Professor of Taxation Schulich School of Business - York University* ***Tax and Estate Planning for Snowbirds***	**Louise Guthrie**, B Math, FLMI, ACS, CAM, CFP, EPC, FDS *AVP, Tax & Retirement Services - Manulife Investments* ***Managing Retirement Risks***	**James W. Kraft**, CA, MTax, CFP, TEP *Marketing V.P., Independent Advisors - Manulife Financial Director, Financial Planning Standards Council Board* ***Positioning Life Insurance as an Asset Protection Vehicle***
12:15 PM	Lunch sponsored by Cardinal Capital Management Inc.		

1:00 PM	**Thomas George**, BASc Environmental Engineering *TD Asset Management Inc.* ***Sustainable Investing***		
2:00:PM	**Cary List**, CA, CFP *President and CEO of the Financial Planners Standards Council* ***Value of Financial Planning***		
2:45 PM	Exhibitor and Refreshment Break sponsored by Manulife Financial		
3:15 PM - 4:15 PM	**Concurrent Educational Sessions**		
	Don Nilson, B.Comm., CMA, M.Sc. (Bus. Admin.), CFP *Nilson & Company* ***Income Splitting: From A:Z***	**Brad S. Hyde**, BBA, CFP, CLU *Wealth & Estate Planner - ATB Insurance Advisors Inc.* ***Critical Illness and Long Term Care - Integration into the planning process***	**Barbara A. Trieloff**, Ph.D., CFP *Senior Relationship Lead, CIBC Retail Markets, Training and Development* ***Financial Planning Strategies for Not-For-Profit Organizations: Planned Giving, Corporate Philanthropy, Major Gifts***
5:30 PM - 7:30 PM	Buffet Dinner at the Hilton Pool sponsored by Renaissance Investments		

Tuesday, May 6th, 2008

6:30 AM	Breakfast sponsored by Mackenzie Investments		
7:00 AM	**Dr. David K. Foot**, Ph.D. *Footwork Consulting Inc. , University of Toronto* ***Who will you be planning for?***		
8:00 AM	**Benjamin Tal** *Renaissance Investments* *Senior Economist - CIBC World Markets* ***Where in the world are we?***		
9:00 AM	Exhibitor & Refreshment Break sponsored by Franklin Templeton Investments		
9:30 AM	**Duncan MacPherson** sponsored by Standard Life *CO-CEO, Pareto Systems and Pareto Platform* ***An Advisor's Guide to The Pareto System Recommendation Process***		
10:30 AM	Sponsor Networking Event		
11:30 AM - 12:30 PM	**Concurrent Educational Sessions**		
	Christina Diles, CA *Associate Partner - Deloitte & Touche LLP* ***Interest Deductibilty and RRSPs***	**Debbie Hartzman**, CFP, CLU, CDFA *Professional Investments* ***What every Advisor needs to know about Separation and Divorce***	**Sandy Cardy**, CA, CFP, TEP *Senior Vice President, Tax and Estate Planning - Mackenzie Financial* ***"The Joint Tenancy Snafu"***
12:30 PM	Lunch sponsored by Franklin Templeton Investments		
1:15 PM	**Chris Jenkins**, BA, CIMA *Vice President - Franklin Templeton Investments* ***Six Sigma for Investing: Delusions of Adequacy***		

2:15 PM	**Doug Towill** Senior Vice President, Strategic Business Development - *CI Investments* ***A Brand New Retirement - A New Retirement Brand***		
3:15 PM	Exhibitor and Refreshment Break sponsored by CI Investments / Sun Life Financial		
3:45 PM - 4:45 PM	**Concurrent Educational Sessions**		
	Harold Geller, BA (Hons.), LLB *Geller and Company - The financial and insurance advisory group of Doucet McBride LLP* ***Compliance and Best Practices as a Competitive edge***	**Ernie Lawson**, CFP ,CA *Young Parkyn Mcnab LLP* ***Estate Freezes***	**Brian Coughlin**, CFP *Vice-President, Business Development - Cardinal Capital Management, Inc.* ***Using Investment Counsel to Build a Niche Practice***
5.30 PM - 8:30 PM	Buffet Dinner at Mannequins (Downtown Disney® Pleasure Island) sponsored by RBC Asset Management		

Wednesday, May 7th, 2008

7:00 AM	Breakfast sponsored by AIM Trimark Investments		
7:30 AM	Conference Closing Remarks		
7:45 AM	**Dr. George Athanassakos**, Ph.D. *Richard Ivey School of Business - The University of Western Ontario* ***Value Vs. Growth Stock Returns and the Value Premium in Canada***		
8:45 AM	**Jamie Golombek**, CA, CPA, CFP, CLU, TEP *AIM Trimark Investments* ***Hot Tax and Estate Planning Issues for Investors***		
9:45 PM	Exhibitor and Refreshment Break sponsored by AIM Trimark Investments		
10:15 AM - 11:15 AM	**Concurrent Educational Sessions**		
	Knut Larsen, cand.oecon., CFP, FCSI *Partner - Brigus Group* ***Investment Risk Evaluation***	**David Salloum**, MBA, CFP, CIM, FSCI, TEP *Vice President/Portfolio Manager - RBCDS* ***What your clients need to know, if they are moving to the US***	**Patrick Longhurst**, CFP, FCIA *Longhurst & Jack Advisory Services Inc.* ***Recent Pension Developments***
11:15 AM - 12:15 PM	**Concurrent Educational Sessions**		
	Shawn Brayman, B.Sc, MES *President - PlanPlus Inc.* ***Beyond Monte Carlo Analysis: A Replacement for a Misunderstood Practice***	**Anthony Williams**, CFP *Academic Director - CIFP* ***Current Trends and Issues in Financial Planning***	
12:15 PM	Conference Adjourns		