Building a strong profession today, for tomorrow
The Canadian Institute of Financial Planners

CIFPs 7th Annual National Conference - 2009

MARRIOTT Halifax Harbourfront
Nova Scotia - June 7th - 10th

Conference Agenda

Sunday, June 7th, 2009

4:30 PM	Registration & Check In
6:00 PM	Cocktail Reception sponsored by Quadrexx Asset Management Inc.
7:00 PM - 9:30 PM	Opening Dinner sponsored by Renaissance Investments Opening Remarks **- Keith Costello**, *President & CEO - CIFPs* **Rex Murphy,** *Social Commentator and Editorial Journalist*

Monday, June 8th, 2009

7:00 AM	Breakfast sponsored by Russell Investments		
7:50 AM	Conference Opening Remarks **- Miklos Nagy**, *Chair - CIFPs* **- Mark Johannessen**, *National Chair - Financial Planning Association*		
8:30 AM	**Lou Schizas**, CIM, FCSI *happycapitalism.com* ***A Planners Guide to Thriving Through a Recession***		
9:30 AM	**Dan Richards** sponsored by Manulife Financial *President - Strategic Imperatives* ***New realities, new approaches – fresh thinking for today's marketplace***		
10:30 AM	Exhibitor and Refreshment Break		
10:45 AM	**Satish Rai**, CFA *Senior Vice President - TD Bank Financial Group* *Vice Chair - TD Asset Management Inc.* ***Hakuna Matata***		
11:45 AM - 12:45 PM	**Concurrent Educational Sessions**		
	Peter Drake, B.A., M.A. *Vice President, Retirement & Economic Research - Fidelity Investments Canada* ***From Market Euphoria to Panic: the Psychology of Investing***	**James W. Kraft**, CA, MTax, CFP, TEP *PlanningWise Inc.* ***New Trends in Insurance Planning***	**Daryl Ching** *Vice President - Canadian Hedge Watch Inc.* ***How US subprime and levered credit default swaps made its way into Canadian ABCP - What did we learn?***
12:45 PM	Lunch sponsored by Professional Investment Services (Canada) Inc.		

1:30 PM	**David Richardson**, PFP, CFP, MBA *Vice President, Enterprise Sales and GFS - RBC Asset Management Inc.* ***Don't waste the crisis***		
2:30 PM	**Benjamin Tal** *Renaissance Investments* *Senior Economist - CIBC World Markets* ***Riding Out the Storm***		
3:30 PM	Exhibitor and Refreshment Break sponsored by Standard Life		
3:45 PM	**Steven R. Wolff**, MBA *CEO - Nova Scotia Pension Agency* ***Tales from Public Pension Funds, Lessons Learned and other Observations***		
4:45 PM - 5:45 PM	**Concurrent Educational Sessions**		
	Anthony Williams, CFP *Academic Director - CIFP* ***Current Trends and Issues in Financial Planning***	**Lea Koiv**, B.Comm., CMA, CA, CFP, TEP *Senior Advisor, Retail Markets - Standard Life Canada* ***Making dollars and sense out of pension income splitting***	**Ann Soden**, Ad.E. ***Elder Law comes of age***
6:30 PM - 8:30 PM	Buffet Dinner at Pier 21 sponsored by TD Mutual Funds		

Tuesday, June 9th, 2009

7:00 AM	Breakfast sponsored by Mackenzie Investments		
7:45 AM	**Dr. Terry Kelly**, CM, BA, D.C.L., D.F.A ***Celebrate Life with The Power of the Dream***		
8:45 AM	**The Honourable Thomas Hockin**, P.C. *Former Minister of State (Finance) and former President, The Investment Funds Institute of Canada (IFIC)* ***National Securities Regulation - What life would be like for financial planners under a single Canadian securities regulator***		
9:45 AM	Exhibitor & Refreshment Break		
10:00 AM	**Jeff Parent**, B.Eng., FCSI *Associate Portfolio Manager, Head of Wealth Management - Quadrexx Asset Management Inc.* ***Rethinking Your Investment Advice***		
10:45 AM	Sponsor Networking Event		
11:45 AM - 12:45 PM	**Concurrent Educational Sessions**		
	Frank Di Pietro, CFA, CFP, B. Admin *Director, Tax and Estate Planning - Mackenzie Financial* ***Tax Planning Leadership in Challenging Times***	**Paul Tyers**, CA, CFP, CIM *Managing Director - HAHN Wealth Stewarts* ***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***
12:45 PM - 1:45 PM	Lunch sponsored by Franklin Templeton Investments		
1:00 PM - 1:30 PM	CIFPs Annual General Meeting		

1:45 PM	**Braydon Scully** *Assistant Vice President, Strategic Account Management - Franklin Templeton Investments* ***Investing in a Recession - "Don't Lose Twice"***		
2:45 PM	**Cary List**, CA, CFP *President & CEO - Financial Planners Standards Council* ***The New Reality – How societal greed has paved the way for financial planning***		
3:30 PM	Exhibitor and Refreshment Break sponsored by Financial Planners Standards Council		
3:45 PM	***Panel: "To Fee or Not To Fee"*** **- John J. De Goey**, MPA, CIM, FCSI, TEP, CFP **- Marc Lamontagne**, CFP, RFP, FMA, CSA **- Terry F. Ritchie**, CFP (US), RFP (Canada), EA (US), TEP **- Shawn Brayman**, B.Sc, MES		
4:45 PM - 5:45 PM	**Concurrent Educational Sessions**		
	Shawn Brayman, B.Sc, MES *President - PlanPlus Inc.* ***Navigating the Perfect Storm***	**Michael Nairne**, CMC, CFA, CFP *President - Tacita Capital Inc.* ***Mastering the New World of Advanced Asset Allocation***	**Deanne Gage** *Editor - Advisor.ca* ***What Consumers Wish They Could Tell You***
6:00 PM - 8:00 PM	Buffet Dinner at Marriot Harbourfront sponsored by RBC Asset Management Inc.		

Wednesday, June 10th, 2009

7:00 AM	Breakfast sponsored by Canadian Hedge Watch Inc. - Remarks by **Debbie Ammeter***, Incoming Chair - FPSC*		
7:30 AM	Conference Closing Remarks - **Keith Costello**, *President & CEO - CIFPs*		
7:45 AM	**Ken Rousselle**, CFP, CLU, Ch.F.C. *President & CEO - Professional Investment Services (Canada) Inc.* ***Partnering with Accountants - Integrating Financial Planning into a Professional Accounting Practice***		
8:45 AM	**Jamie Golombek**, CA, CPA, CFP, CLU, TEP *Managing Director, Tax and Estate Planning - CIBC Private Wealth Management* ***Hot Tax and Estate Planning Issues for Investors***		
9:45 AM	Exhibitor and Refreshment Break sponsored by Fidelity Investments		
10:00 AM - 11:00 AM	**Concurrent Educational Sessions**		
	Frederick M. Pinto, CFA *Director, Distribution Services - Russell Investments* ***Retirement: Time for a new conversation***	**Janet Freedman**, B.Sc, CFP, RFP *President - Finance Matters Ltd.* ***Registered Disability Savings Plans (RDSP)***	**Chris Toye**, MBA, CGA, CFA, CFP ***Small Business Valuation for Financial Planners***
11:00 AM - 12:00 PM	**Concurrent Educational Sessions**		
	Larry Berman, CFA, CMT, CTA *Chief Investment Officer - ETF Capital Management* ***ETFs and Active Portfolio Management: The Two Most Important Trends Reshaping The Investment Industry***	**Don Nilson**, B. Comm., M. Sc. (Bus. Admin.), CMA, FCMA, CFP, TEP *Nilson & Company* ***Tax Free Savings Account (TFSA) versus other Investment Accounts***	**Doreen Gardner Brown**, BHEc, CFP *President - Gardner Brown Consulting Inc.* ***Collaborative Practice – a viable option for divorcing clients***
12:00 PM	Conference Adjourns		