Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

CIFPs 8th Annual National Conference - 2010

Sheraton on the Falls
Niagara Falls, ON – June 13th - 16th

Agenda

Sunday, June 13th, 2010

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 RBC Global Asset Management Opening Remarks **- Keith Costello**, *President & CEO - CIFPs* **General Rick Hillier,** *Former Chief of the Defence Staff for Canadian Forces*

Monday, June 14th, 2010

7:00 AM	Breakfast sponsored by Invesco Trimark		
7:45 AM	Conference Opening Remarks - **Miklos Nagy**, *Chair - CIFPs*		
8:25 AM	**Susan Wolburgh Jenah**, B.A., LL.B. *President & CEO - Investment Industry Regulatory Organization of Canada (IIROC)* ***Professionalism and Proficiency in the Financial Services Industry: why it matters more than ever!***		
9:10 AM	**Hermann F. Leiningen** *Managing Director, Institutional Investment Strategy (International), RBC Global Asset Management* ***Global Market Outlook, with an Eye on Resources***		
10:10 AM - 10:45 AM	Exhibitor and Refreshment Break sponsored by Walton		
10:10 AM - 10:45 AM	CIFPs Annual General Meeting **(Free conference trip 2011 draw for attendees)**		
10:45 AM	**Frederick M. Pinto**, CFA *Managing Director, Distribution Services - Russell Investments Canada Ltd.* ***Powerful Insights to Help your Clients Achieve a Financially Healthy Retirement***		
11:45 AM - 12:45 PM	**Concurrent Educational Sessions**		
	James W. Kraft, CA, MTax, CFP, TEP *President - PlanningWise Inc.* ***Managing the Insurance Policy Portfolio***	**Laurier Guimond** *Human Resources and Skills Development Canada* ***Modernizing the Canada Pension Plan (CPP)***	**Peter Drake**, B.A., M.A. *Vice President, Retirement & Economic Research - Fidelity Investments Canada* ***Rational Investing in an Emotional World***
12:45 PM	Lunch sponsored by Russell Investments		
1:30 PM	**Rob Kochel** *Vice President, National Accounts - Invesco Trimark* **Mike Cook** *Vice President, Alternative Strategies - Invesco Trimark* ***Is Portolio Diversification Dead?***		

2:30 PM	**Jeff Parent**, B.Eng., FCSI *Associate Portfolio Manager, Head of Wealth Management - Quadrexx Asset Management Inc.* ***Statistics, Useful info for Financial Planning***		
3:30 PM	Exhibitor and Refreshment Break sponsored by Standard Life		
3:45 PM	**Florence Marino**, B.A., LL.B., TEP *Assistant Vice President, Tax & Estate Planning Group - Manulife Financial* ***Wealth Accumulation through Exempt Life Insurance – From Needing to Wanting Life Insurance***		
4:45 PM - 5:45 PM	**Concurrent Educational Sessions**		
	Henry Kielar, CA, CFP *Senior Consultant, Investment Products - Standard Life* ***Retirement Income Plans - Focus on the Plan, not the portfolio***	**Anthony Williams**, CFP *Academic Director - CIFP* ***Current Trends and Issues in Financial Planning***	**Stacie R. Glazman**, LL.B., LL.M., CBV, C.S. *Stacie R. Glazman Professional Corporation* ***Baby Boomers and Transfers of Wealth: Protecting the Second Generation from their Spouses upon Separation***
6:30 PM - 8:30 PM	Buffet Dinner at Edgewaters Tap and Grill sponsored by TD Mutual Funds		

Tuesday, June 15th, 2010

7:00 AM	Breakfast sponsored by Sun Life Financial		
7:45 AM	**Jean-Pierre Diserens** *Vice-Chairman & Executive Vice President - Convention of Independent Financial Advisors (CIFA)* ***Financial Crisis, Bubbles, Sovereign Debt, Taxes, Real Estate, Commodities, Drugs, Organized Crime. Is it Time to Reinstate the Communist Party?***		
8:45 AM	**Kevin Strain**, CA, MAcc *Senior Vice President, Individual Insurance and Investments - Sun Life Financial Canada* ***Financial Advice.... Yesterday, Today and Tomorrow***		
9:45 AM	Exhibitor & Refreshment Break sponsored by BMO Financial Group		
10:00 AM	**Dave Pickett** sponsored by TD Mutual Funds *Senior Vice President, Practice Management - TD Wealth Management* ***A Client Conversation in 2010***		
11:00 AM	Sponsor Networking Event **(Free conference trip 2011 draw for attendees)**		
12:00 PM - 1:00 PM	**Concurrent Educational Sessions**		
	Rebecca A. Cowdery & **Prema K. R. Thiele** *Partners – Borden Ladner Gervais LLP* ***NI 31-103 - Keeping up with Compliance and New Expectations***	**Perry Truster**, B.S.C., F.C.A., T.E.P., CA *Founding Partner - Truster Zweig* ***Income Tax Implications of Transferring an Insurance Policy from an Individual to his/her Corporation***	**Wilmot George**, CFP, B.A.(Hons) *Director Tax & Estate Planning - Mackenzie Financial* ***Tax Talk 2010 – Keeping Up To Speed on Changes That Can Impact Client Portfolios***
1:00 PM - 2:00 PM	Lunch sponsored by Franklin Templeton Investments		
1:30 PM - 2:00 PM	Special Session – CIFPs Compensation Research Survey & Planipedia demonstration **(Free conference trip 2011 draw for attendees)**		
2:00 PM	**Bradley Radin**, CFA, MBA *Executive Vice President, Portfolio Manager/Research Analyst* *Templeton Global Equity Group, Templeton Investment Management* **Ryan Lawrence** *National Manager, Strategic Account Management - Franklin Templeton Investments* ***2020 Vision: Global Equity Investing Today for the Decade Ahead***		

3:00 PM	**Cary List**, CA, CFP *President & CEO - Financial Planning Standards Council* ***Financial planning - Selling the Value Proposition***		
3:45 PM	Exhibitor and Refreshment Break sponsored by Financial Planning Standards Council		
4:00 PM	**Mark Halpern**, CFP, FMA *President - illnessPROTECTION.com* ***The Critical Path – 7 Great Ideas to grow your Critical Illness Sales***		
5:00 PM - 6:00 PM	**Concurrent Educational Sessions**		
	John D. Zechner, B.A., M.A., CFA *Chairman and Chief Investment Officer - J.Zechner Associates, Inc.* ***Investing in Volatile Times***	**Shawn Brayman**, B.Sc, MES *President - PlanPlus Inc.* ***Research in Review: A review of top academic research and industry studies in the field of financial planning***	**Lynn Biscott**, CFP, RFP *Fernwood Consulting Group Inc.* ***Retirement Plans for Executives and Senior Managers – What Financial Planners Need to Know***
6:30 PM - 8:30 PM	Buffet Dinner at Crowne Plaza sponsored by Renaissance Investments		

Wednesday, June 16th, 2010

7:00 AM	Breakfast sponsored by Mackenzie Investments		
7:30 AM	Conference Closing Remarks - **Keith Costello**, *President & CEO - CIFPs*		
7:45 AM	**Dr. Dale Orr**, Ph.D. *Economic Insight* ***Economic Recovery: When? How? At What Cost?***		
8:45 AM	**Jamie Golombek**, CA, CPA, CFP, CLU, TEP sponsored by Renaissance Investments *Managing Director, Tax and Estate Planning - CIBC Private Wealth Management* ***Intaxicating!***		
9:45 AM	Exhibitor and Refreshment Break sponsored by Advisor.ca		
10:00 AM - 11:00 AM	**Concurrent Educational Sessions**		
	Matt Reynolds, CFA *Executive Vice President, Capital Markets - Walton Asset Management* ***Integrating Alternatives during Secular Bear Markets***	**Dr. Amin Mawani**, LLM, Ph.D., FCMA, CFP *Associate Professor of Accounting and Taxation, Schulich School of Business - York University* ***Freedom till 55: Impact of Pre-Retirement Withdrawals***	**Kevin O'Brien**, CFP, CDFA *Kevin O'Brien & Associates* ***Incorporating Estate Planning into your Financial Planning Practice***
11:00 AM - 12:00 PM	**Concurrent Educational Sessions**		
	Normand Frenette, FCIA, FSA *Retirement Practice Leader - Buck Consultants* ***Integrating Individual Pension Plans into fiscal and retirement planning***	**Brad Hyde**, BBA, CFP, CLU, RHU *Director, Individual Insurance Sales, Prairies - Manulife Financial* ***Keeping up with the Boomers: Transitioning from Retirement Planning to Estate Planning***	**Roxanne Eszes**, CFP, P.Eng. *President - Learning Partner* ***Retirement Income – product allocation being used as a strategy to reduce retirement specific risks***
12:00 PM	Conference Adjourns		