Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

CIFPs 9th Annual National Conference - 2011

Ottawa Marriott Hotel

Ontario – June 5th - 8th

Agenda

Sunday, June 5th, 2011

4:30 PM	Registration & Check In
6:00 PM	Cocktail Reception sponsored by Sun Life Financial
7:00 PM - 9:30 PM	Opening Dinner sponsored by Renaissance Investments Opening Remarks **- Keith Costello**, *President & CEO - CIFPs* **Andrew Coyne**, *National Editor of Maclean's magazine*

Monday, June 6th, 2011

7:00 AM	Breakfast sponsored by Mackenzie Investments		
7:45 AM	Conference Opening Remarks - **Tony Mahabir**, Chair - CIFPs **Martin Dupras**, Chair - IQPF		
8:25 AM	**The Honourable Thomas Hockin**, P.C. *Executive Director - International Monetary Fund (IMF) and former Minister of State (Finance) and former President - The Investment Funds Institute of Canada (IFIC)* ***Global Economic and Financial Challenges: The IMF's Perspective***		
9:10 AM	**Jamie Golombek**, CA, CPA, CFP, CLU, TEP *Managing Director, Tax and Estate Planning - CIBC Private Wealth Management* ***"Registered Plan Prioritization: Theory & Practice" and*** ***"How the 2011 Budget Affects You and Your Clients"***		
10:10 AM - 11:00 AM	Exhibitor and Refreshment Break sponsored by Manulife Financial		
10:10 AM - 11:00 AM	CIFPs Annual General Meeting **(Free conference trip 2012 draw for attendees)**		
11:00 AM	**John Zechner**, B.A., M.A., CFA *Chairman and Chief Investment Officer - J. Zechner Associates Inc.* ***Adding Value Thru Asset Allocation and Sector Rotation***		
12:00 PM - 1:00 PM	**Concurrent Educational Sessions**		
	Carol Bezaire, PFPC., TEP, CLU *Vice President, Tax and Estate Planning - Mackenzie Financial* ***Strategies to Help Clients Generate Income and Transfer Wealth***	**John J. De Goey**, MPA, CIM, FCSI, TEP, CFP *Vice President - Burgeonvest Bick Securities Limited* ***Investment Planning and Investment Planning Statements***	**Lynda Gibson**, CGA *Manager, Aggressive Tax Planning Division - Canadian Revenue Agency (CRA)* **Phil Diguer** *Manager, Aggressive Tax Planning's, Projects and Initiative Section - CRA* ***The Income Tax Act … & You***

1:00 PM - 2:30 PM	Lunch and Speaker sponsored by Fidelity Investments **Peter Drake**, B.A., M.A. Vice President, Retirement & Economic Research - Fidelity Investments Canada ***The new retirement generation: Implications for financial planning***		
2:30 PM	**Cary List**, CA, CFP *President & CEO - Financial Planning Standards Council* ***The Status of Financial Planning Certification Around the World***		
3:30 PM - 4:00 PM	Exhibitor and Refreshment Break sponsored by Financial Planning Standards Council		
4:00 PM - 5:00 PM	**Concurrent Educational Sessions**		
	Keith Pangretitsch *Director, National Sales - Russell Investments Canada Limited* ***Growing your business through High Speed Strategic Planning***	**Ron Meisels** *President - Phases & Cycles Inc.* ***Technical Analysis in Making Investment Decisions***	**Shawn Brayman**, Ch.FP., B.Sc, MES *President - PlanPlus Inc.* ***Research to Makes us Better Financial Planners***
5:00 PM - 6:00 PM	***Comprehensive Financial Planning Case Study (Part 1)*** sponsored by BMO Financial Group	***Building new client momentum (Part 1) Referral strategies that work today*** **Dan Richards** *Founder and CEO - Clientinsights.ca*	
7:00 PM - 9:00 PM	Dinner at the Canadian Museum of Civilization sponsored by TD Asset Management Inc.		

Tuesday, June 7th, 2011

7:00 AM	Breakfast sponsored by Russell Investments		
7:45 AM	**Glen Hodgson**, M.A., Ph.D. *Senior Vice President and Chief Economist - The Conference Board of Canada* ***The Recession, the Recovery and the Future: What it All Means for You***		
8:45 AM	Panel Discussion on **North American Opportunities** hosted by **MaryAnn Mathews** with: **Bruce Cooper** *Vice Chair - TD Asset Management Inc.* **Larry Puglia** *Vice President - T. Rowe Price Group, Inc.*		
9:45 AM - 10:35 AM	Exhibitor & Refreshment Break sponsored by Sun Life Global Investments		
10:35 AM	**Paul Fryer**, FSA, FCIA, B.Math. *Vice President, Individual Insurance - Sun Life Financial* ***Life Stage Planning for Post Retirement incorporating a Healthy Strategy***		
11:35 AM - 12:35 PM	**Concurrent Educational Sessions**		
	Rob Kochel *Vice President, National Accounts - Invesco Trimark* ***"StorySelling" … making the unknown known using the familiar***	**I.J. (Ida-Jean) McIntyre** *True North Workshops* ***Retirement Dimensions™ - Exploring Retirement Preferences***	**Patrick Longhurst**, CFP, FCIA *President - Longhurst & Jack Inc.* ***Helping your Clients through the Pension Decision Process***
12:35 PM - 2:25 PM	Lunch and Speaker sponsored by Franklin Templeton Investments ***Ryan Lawrence*** *Assistant Vice President - Franklin Templeton Investments* ***Capitalize on a Changing World***		
2:25 PM - 3:20 PM	Sponsor Networking Event **(Free conference trip 2012 draw for attendees)**		

3:20 PM	**Grant Shorten** *Director, Strategic Insights - Renaissance Investments* ***Engaging the Affluent Investor***	
4:20 PM - 4:50 PM	Exhibitor and Refreshment Break sponsored by BMO Financial Group	
4:20 PM - 6:00 PM	***Comprehensive Financial Planning Case Study (Part 2 and 3)*** sponsored by BMO Financial Group	***Building new client momentum (Part 2) Developing a pipeline of prospective clients*** **Dan Richards** *Founder and CEO - Clientinsights.ca*
6:45 PM - 8:45 PM	Buffet Dinner - Summit Room at the Marriott sponsored by Sun Life Financial	

Wednesday, June 8th, 2011

7:00 AM	Breakfast sponsored by Invesco Trimark		
7:30 AM	**Kelley Keehn** *Financial Expert, Author, Speaker, and Financial Host of Burn My Mortgage* ***You Inc. for Financial Professionals***		
8:30 AM	Conference Closing Remarks - **Keith Costello**, *President & CEO - CIFPs*		
8:45 AM	**Steve Krupicz**, FSA, FCIA, HBSc *Actuarial Consultant - Manulife Financial* **Life Expectancy & Financial Planning**		
9:45 AM	Exhibitor and Refreshment Break by Manulife Financial		
10:00 AM - 11:00 AM	**Concurrent Educational Sessions**		
	Kevin Prins, TBA, MBA, CIM, FCSI, CFP *Vice President, Ontario Region BMO Exchange Traded Funds - BMO Financial Group* ***Financial Planning Approach to ETFs***	**Andrea Kelly** Barrister & Solicitor ***How to Avoid Disputes Over Your Estate***	**Erez Blumberger** *Deputy Director, Compliance and Registrant Regulation - Ontario Securities Commission* ***Understanding what you can and cannot do as a licensed representative***
11:00 AM - 12:00 PM	**Concurrent Educational Sessions**		
	Doug Carroll, JD, LLM, CFP, TEP *Vice President, Tax and Estate Planning - Invesco Trimark* ***Professional Corporations – Leveraging the Tax Opportunities***	**Joanna Reid**, B.A. *Vice President, Consumer Practice - Marsh Canada Limited* ***ABC's of E&O - Are you properly protected?***	**John J. De Goey**, MPA, CIM, FCSI, TEP, CFP *Vice President - Burgeonvest Bick Securities Limited* ***Current Trends and Issues in Financial Planning***
12:00 PM	Conference Adjourns		