



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

CIFPs 10th Annual National Conference - 2012

PLAN TO GROW WEST

Sheraton Vancouver Wall Centre Hotel

British Columbia - May 27th - 30th, 2012

Sunday May 27, 2012

4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception sponsored by Sun Life Financial	Exhibitor Area
7:00 p.m. – 9:30 p.m.	Opening Dinner sponsored by Sun Life Financial Opening Dinner Speaker: Brent Butt – <i>Celebrated Canadian Comedian</i>	Grand Ballroom

Monday May 28, 2012

7:00 a.m.	Breakfast sponsored by Sentry Investments	Grand Ballroom	
7:45 a.m.	Tony Mahabir <i>Chair of the Board of Directors - CIFPs</i> Conference Opening Remarks	Grand Ballroom	
8:00 a.m.	Eugene Ellmen <i>Executive Director - Social Investment Organization</i> Socially Responsible Investing	Grand Ballroom	
8:25 a.m.	Dr. Peter Andersen <i>Expert Economic Forecaster</i> Get Ready for a Changed Economic Landscape (i.e. Euro crisis, U.S. Economy and Election)	Grand Ballroom	
9:10 a.m.	J. A. (Sandy) McIntyre <i>President & CEO - Sentry Investments</i> Finding the Sweet Spot Between Risk and Return	Grand Ballroom	
10:10 a.m. – 11:00 a.m.	Exhibitor & Refreshment Break sponsored by Financial Planning Standards Council	Exhibitor Area	
	CIFPs Annual General Meeting (Free conference trip 2013 draw for attendees)	Pavilion Ballroom AB	
11:00 a.m.	Peter Drake <i>Vice President, Retirement & Economic Research - Fidelity Investments Canada</i> The shift to retirement income: Beyond the headlines	Grand Ballroom	
12:00 p.m.	Sponsor Networking Event (Free conference trip 2013 draw for attendees)	Grand Ballroom	
1:00 p.m. – 2:00 p.m.	Lunch sponsored by Fidelity Investments	Grand Ballroom	
2:00 p.m. – 3:00 p.m.	Concurrent Education Sessions		
	Floyd Gradley, B.Comm., LL.B. <i>Estate & Trust Lawyer, Tax and Estate Planning Team - Mackenzie Financial Corporation</i> Impact of U.S. Taxation on Canadians	J.E. (Jim) Thatcher <i>Regional Technical Advisor for ATP, Pacific Region Compliance Programs Branch, International & Large Business Directorate Aggressive Tax Planning ("ATP") Division - Canada Revenue Agency</i> The Income Tax Act...and You!	Ron Meisels <i>Founder and President - Phases & Cycles Inc.</i> Technical Analysis
	Pavilion Ballroom AB	Pavilion Ballroom C	Pavilion Ballroom D

3:00 p.m. – 3:30 p.m.	Exhibitor & Refreshment Break sponsored by Quadrex Asset Management Inc.		Exhibitor Area
3:30 p.m. – 4:30 p.m.	Concurrent Education Sessions		
	<p style="text-align: center;">Braydon Scully AVP Strategic Account Management - Franklin Templeton Investments Building an Ideal Client Experience</p> <p style="text-align: center;">Pavilion Ballroom AB</p>	<p style="text-align: center;">Karen Stewart President, Founder & CEO - Fairway Divorce Solutions® Navigating Your Clients Through Divorce</p> <p style="text-align: center;">Pavilion Ballroom C</p>	<p style="text-align: center;">John J. De Goey, MPA, CIM, FCSI, TEP, CFP® Vice President and Associate Portfolio Manager - Burgeonvest Bick Securities Limited Patrick Longhurst, CFP®, FCIA Patrick Longhurst Advisory Services Inc. Current Trends in Financial Planning</p> <p style="text-align: center;">Pavilion Ballroom D</p>
4:30 p.m.	<p style="text-align: center;">Anthony Williams, CFP® Vice President, Academic Affairs - The Canadian Institute of Financial Planning (CIFP) Financial Planning Case Study</p> <p style="text-align: center;">Grand Ballroom</p>	<p style="text-align: center;">Dan Richards Founder and CEO - ClientInsights.ca Why everything you know about referrals is wrong – and what to do about it</p> <p style="text-align: center;">Pavilion Ballroom D</p>	
6:30 p.m. – 8:30 p.m.	Buffet Dinner while exploring the Vancouver Aquarium sponsored by TD Asset Management Inc.		

Tuesday May 29, 2012

7:00 a.m.	Breakfast sponsored by Franklin Templeton Investments		Grand Ballroom
7:45 a.m.	<p>Doug Warwick, CFA Managing Director & Portfolio Manager - TD Asset Management Inc. David Sykes, CFA Vice President & Director - TD Asset Management Inc. Panel Discussion hosted by Terry Fullerton on The Yield Appeal: Dividend Investing for the Current Market Environment</p>		Grand Ballroom
8:45 a.m.	<p>Niels Veldhuis President of Research - Fraser Institute Canada at an Economic Crossroads: Where We've Been, Where We're Going and What We Should Aspire to Become</p>		Grand Ballroom
9:45 a.m. – 10:35 a.m.	Exhibitor & Refreshment Break sponsored by Investment Executive		Exhibitor Area
10:35 a.m.	<p>Mike Banham Vice President, Wealth Distribution - Sun Life Global Investments Zooming into retirement</p>		Grand Ballroom
11:35 a.m. – 12:35 p.m.	Concurrent Education Sessions		
	<p style="text-align: center;">Doug Yam Regional Vice President, Wealth Sales Individual Distribution and Marketing team - Sun Life Global Investments Retirement ready: the one idea you can't afford to miss</p> <p style="text-align: center;">Pavilion Ballroom AB</p>	<p style="text-align: center;">Cynthia Kett, CA, CGA, CFP®, RFP Stewart & Kett Financial Advisors Inc. How Diversified is Your Life?</p> <p style="text-align: center;">Pavilion Ballroom C</p>	<p style="text-align: center;">Dave Pickett Senior Vice President - TD Waterhouse Canada Inc. What Women Want from Investing</p> <p style="text-align: center;">Pavilion Ballroom D</p>
12:35 p.m. – 2:00 p.m.	Lunch sponsored by Manulife Financial		
	<p>Mark J. Fuller, LL.B. President & CEO - Ontario Pension Board A Look at Defined Benefit Pensions in Canada through a Financial Advisor's Prism</p>		Grand Ballroom
2:00 p.m.	<p>Philippe Schultheiss, MBA, CA AVP, Tax & Estate Planning Group - Manulife Financial Insurance assisted planned giving strategies for business owners</p>		Grand Ballroom

3:00 p.m. – 3:30 p.m.	Exhibitor and Refreshment Break sponsored by Manulife Securities	Exhibitor Area
3:30 p.m.	Stephen Rotstein, BA, LL.B. <i>Vice President, Policy & Enforcement & General Counsel - Financial Planning Standards Council</i> Leona Trantor, LL.B., CFP® <i>Director, Standards Enforcement - Financial Planning Standards Council</i> What happens when a client complains, and how to elevate your professional conduct to avoid these situations	Grand Ballroom
4:30 p.m.	Dr. Sylvain Charlebois, DBA, MBA, B.Comm. <i>Dean, College of Management and Economics - University of Guelph</i> Food Inflation	Grand Ballroom
7:00 p.m. – 8:30 p.m.	Buffet Dinner at Sheraton Wall Centre sponsored by Renaissance Investments	Grand Ballroom

Wednesday May 30, 2012

7:00 a.m.	Breakfast sponsored by Mackenzie Investments	Grand Ballroom
7:30 a.m.	Keith Costello <i>President & CEO - CIFPs</i> Conference Closing Remarks	Grand Ballroom
7:45 a.m.	Colin Angus <i>Canadian Adventurer, Author & Filmmaker</i>	Grand Ballroom
8:45 a.m.	Grant Shorten <i>Director, Strategic Insights - Renaissance Investments</i> Awesome First Meetings - The 10 Phase Initial-Impact Model	Grand Ballroom
9:45 a.m.	Exhibitor and Refreshment Break sponsored by TD Investment Lending Services	Exhibitor Area
10:00 a.m. – 11:00 a.m.	Concurrent Education Sessions	
	Rein Selles, M.Sc, PRP <i>President - Retirement/Life Challenge Ltd.</i> So who does retirement planning anyway? Pavilion Ballroom AB	Knut Larsen, cand.oecon., CFP®, FCSI <i>Partner - Brigus Group</i> Statistical Evaluation of Investment Outcomes Pavilion Ballroom C
11:00 a.m. – 12:00 p.m.	Concurrent Education Sessions	
	Patrick Longhurst, CFP®, FCIA <i>Patrick Longhurst Advisory Services Inc.</i> Pension Update - The Good, the Bad and the Ugly Pavilion Ballroom ABC	Shawn Brayman <i>President - PlanPlus Inc.</i> Global Best Practices for Accessing Investment Suitability Pavilion Ballroom D
12:00 p.m.	Conference Adjourns	