CIFPs

Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

CIFPs 11th Annual National Conference - 2013

CLEAR THE MIST FROM YOUR PLAN

Sheraton on the Falls, Niagara Falls

Ontario - May 26th - 29th, 2013

Conference Agenda

Sunday May 26, 2013

4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception *sponsored by Renaissance Investments*	***Exhibitor Area***
7:00 p.m. – 9:30 p.m.	Opening Dinner *sponsored by Renaissance Investments* Opening Dinner Speaker: **Mike Bullard –** *'Open Mike' Comedian*	***Great Room BC***

Monday May 27, 2013

<table>
<tr><td>7:00 a.m.</td><td colspan="3">Breakfast sponsored by TD Asset Management Inc.</td><td>Great Room BC</td></tr>
<tr><td>7:30 a.m.</td><td colspan="3">Conference Opening Remarks - Tony Mahabir</td><td>Great Room BC</td></tr>
<tr><td>7:45 a.m.</td><td colspan="3">Anish Chopra, CA, CFA
Managing Director - TD Asset Management Inc.
David Sykes, CFA
Vice President & Director - TD Asset Management Inc.
Panel Discussion hosted by Terry Fullerton on
Balanced Investing for Today's Opportunities</td><td>Great Room BC</td></tr>
<tr><td>8:45 a.m.</td><td colspan="3">Jeff Rubin
Leading Economist and Energy Expert
The End of Growth: But Is That All Bad?</td><td>.75 FPSC
Great Room BC</td></tr>
<tr><td>9:30 a.m.</td><td colspan="3">Michael R. Banham
Vice-President, Wealth Distribution - Sun Life Global Investments
Retirement Planning Redefined</td><td>Great Room BC</td></tr>
<tr><td rowspan="2">10:30 a.m. – 11:15 a.m.</td><td colspan="3">Exhibitor and Refreshment Break sponsored by Franklin Templeton Investments</td><td>Exhibitor Area</td></tr>
<tr><td colspan="3">CIFPs Annual General Meeting (attendees eligible for 2014 Conference draw)</td><td>Fallsview Studio ABC</td></tr>
<tr><td rowspan="2">11:15 a.m. – 12:15 p.m.</td><td colspan="4">Concurrent Education Sessions</td></tr>
<tr><td>Kevin Jeffries, CFP®
Senior Advisor Consultant - Franklin Templeton Investments
Time to Take Stock
Strategy Room 1</td><td>Amber Scott, MBA, CAMS, CIPP/C
Senior Manager, Financial Crime Risk & Compliance - MNP LLP
Money laundering, terrorist financing, economic sanctions and tax evasion – why it pays to comply.
1 FPSC
Strategy Room 2</td><td colspan="2">David Prince
Founder and President - Harbinger Capital Markets Research Inc.
A Different View on Capital Markets
1 FPSC
Strategy Room 3</td></tr>
<tr><td>12:15 p.m.</td><td colspan="3">Sponsor Networking Event (attendees eligible for 2014 Conference draw)</td><td>Great Room BC</td></tr>
<tr><td>1:15 p.m. – 2:00 p.m.</td><td colspan="3">Lunch sponsored by Middlefield Funds</td><td>Great Room BC</td></tr>
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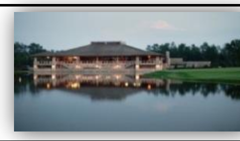
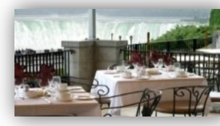
2:00 p.m.	**Dean Orrico** *President & Chief Investment Officer - Middlefield Capital Corporation* **Going Global Makes Sense for Equity Income Investors**	***Great Room BC***
3:00 p.m. – 4:00 p.m.	**Concurrent Education Sessions**	
	M. Claudia Morrow *Vice-President, Corporate Affairs, General Counsel and Corporate Secretary - Canada Deposit Insurance Corporation* **The Beginning of the End of "Too Big to Fail"**	***Strategy Room 1***
	Jessica Bullock, LL.B. *Senior Associate, Pension & Employment Group - Torys LLP* **Security of Pensions in the Post-Indalex World**	***Strategy Room 2***
	Doug Yam *Regional Vice President, Wealth Sales Individual Distribution and Marketing team - Sun Life Global Investments* **"Let's Fix Income"**	***Strategy Room 3***
4:00 p.m. – 4:30 p.m.	Exhibitor and Refreshment Break *sponsored by Investment Executive*	***Exhibitor Area***
4:30 p.m. - 6:00 p.m.	**Financial Planning Case Study** **Anthony Williams**, CFP® *Vice President, Academic Affairs - Canadian Institute of Financial Planning (CIFP)*	***Great Room BC***
7:00 p.m. – 9:00 p.m.	Buffet Dinner while enjoying the scenery at the Legends on the Niagara Clubhouse *sponsored by Sentry Investments*	

Tuesday May 28, 2013

7:00 a.m.	Breakfast *sponsored by Fidelity Investments*	***Great Room BC***
7:30 a.m.	**Lou Schizas**, CIM, FCSI *happycapitalism.com* **A Planner's Guide to Thriving When The Stimulus Ends**	***Great Room BC***
8:30 a.m.	**Dennis Mitchell**, MBA, CFA *Executive Vice-President & Chief Investment Officer - Sentry Investments* **Asset Allocation Between Dividend and Interest Vehicles**	***Great Room BC***
9:30 a.m.	**Peter Drake** *Vice President, Retirement & Economic Research - Fidelity Investments Canada* **Retirement 20/20**	***Great Room BC***
10:30 a.m. – 11:15 a.m.	Exhibitor and Refreshment Break *sponsored by Maximizer Software*	***Exhibitor Area***
11:15 a.m.	**Daniel S. Janis III** *Senior Managing Director & Lead Portfolio Manager - Manulife Asset Management* **The Global Search for Yield**	***Great Room BC***
12:15 p.m. – 1:15 p.m.	**Concurrent Education Sessions**	
	John Easton *Director, Product Management & Strategic Relations - Maximizer Software* **7 Ways to Build Book Value with CRM Technology**	***Strategy Room 1***
	Jim Randall, CGA *Tax Specialist - Canada Revenue Agency* **Aggressive Tax Planning Issues for Financial Advisors**	***Strategy Room 2***
	James Dutkiewicz, CFA *Vice-President & Senior Portfolio Manager - Sentry Investments* **Impact of Interest and Inflation Rates on Investing**	***Strategy Room 3***
1:15 p.m. – 2:00 p.m.	Lunch *sponsored by Mackenzie Investments*	***Great Room BC***
2:00 p.m.	**Frank Di Pietro**, CFA, CFP® *Director, Tax & Estate Planning - Mackenzie Financial* **Tax and Estate Planning for Business Owners**	***Great Room BC***

3:00 p.m.	**Cary List**, CA, CFP® *President & CEO - Financial Planning Standards Council* **Destination Strategy for Growth: Value, Awareness, Profitability** ***Great Room BC***		
4:00 p.m. – 4:30 p.m.	Exhibitor and Refreshment Break *sponsored by Financial Planning Standards Council* ***Exhibitor Area***		
4:30 p.m. - 6:00 p.m.	**Concurrent Education Sessions**		
	Eleanor Farrell *Director, Office of the Investor - Ontario Securities Commission* **Jeffrey Scanlon** *Legal Counsel, Compliance and Registrant Regulation Branch - Ontario Securities Commission* **The Standard of Conduct for Advisors and Dealers** ***Great Room BC***	**John Harris**, MA, MBA, Ph.D., CGA, FCMA *Education Committee - The Canadian Institute of Financial Planners (CIFPs)* **Current Trends and Issues in Financial Planning** ***Strategy Room 2***	
7:00 p.m. – 9:00 p.m.	Buffet Dinner while enjoying the view of the falls at Edgewaters Restaurant *sponsored by Sun Life Financial* 		

Wednesday May 29, 2013

7:00 a.m.	Breakfast *sponsored by Manulife Financial* ***Great Room BC***		
7:30 a.m.	**Keith Costello** *President & CEO - Canadian Institute of Financial Planners (CIFPs)* **Conference Closing Remarks** ***Great Room BC***		
7:45 a.m.	**General Walter Natynczyk**, CMM, MSC, CD *Former Chief of the Defence Staff* **Leadership Lessons** ***Great Room BC***		
8:45 a.m.	**Jamie Golombek**, CA, CPA, CFP®, CLU, TEP *Managing Director, Tax & Estate Planning - CIBC Private Wealth Management* **Tax Planning Post-Budget 2013: What's left?** ***Great Room BC***		
9:45 a.m.	Exhibitor and Refreshment Break *sponsored by Maximizer Software* ***Exhibitor Area***		
10:00 a.m. – 11:00 a.m.	**Concurrent Education Sessions**		
	Av Lieberman, PRP *President - The Retirement Education Centre Inc.* **Lifestyle and Retirement Transition Planning** ***Strategy Room 1***	**Kevin Shand** *Regional Director of Sales, Southwestern Ontario - Renaissance Investments* **Fork in the Road: Today's Income Decision** ***Strategy Room 2***	**Shawn Brayman** *President - PlanPlus Inc.* **Retirement Income Planning – A Deep Dive** ***Strategy Room 3***
11:00 a.m. – 12:00 p.m.	**Concurrent Education Sessions**		
	Babak Rafat, CFA *Sales Strategy Analyst - TD Asset Management Inc.* **Re-thinking Risk & Reward** ***Strategy Room 1***	**John J. De Goey**, CFP®, Fellow of the FPSC™ *Vice President & Associate Portfolio Manager - Burgeonvest Bick Securities Limited* **Transparency, Informed Consent and our Clients' Best Interests** ***Strategy Room 2***	**Brian W. Sweigman**, J.D. Associate Lawyer - Goldstein, Rosen & Rassos LLP **Digital Estate Planning: How to Pass On an Online Legacy** ***Strategy Room 3***
12:00 p.m.	Conference Adjourns		