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

CIFPs 12th Annual National Conference - 2014

CLEAR THE FOG FROM YOUR PLAN

Halifax Marriott Harbourfront Hotel

Halifax - June 8th - 11th, 2014

Sunday June 8, 2014

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: **"Colin & Deb" Colin Mochrie and Debra McGrath** - *Improv Comedy*	***NS Ballroom***

Monday June 9, 2014

7:00 a.m.	Breakfast *sponsored by TD Asset Management Inc.*	***NS Ballroom***
7:30 a.m.	**Tony Mahabir** *Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)* **Conference Opening Remarks**	***NS Ballroom***
7:45 a.m.	**Dino Bourdos**, CFA *Managing Director - TD Asset Management Inc.* **Investing for the New Retirement Realities**	***NS Ballroom***
8:45 a.m.	**Susan Wolburgh Jenah** *President & CEO - Investment Industry Regulatory Organization of Canada (IIROC)* **The Evolution of the Investment Industry and Professional Standards**	***NS Ballroom***
9:30 a.m.	**Michael R. Banham** *Vice-President, Wealth Distribution - Sun Life Global Investments* **Survey says: Guaranteed Retirement Income for Life is a must for most Canadians**	***NS Ballroom***
10:30 a.m. – 11:15 a.m.	Exhibitor and Refreshment Break *sponsored by Maximizer Software*	***Exhibitor Area***
11:15 a.m. – 12:15 p.m.	**Concurrent Education Sessions**	
	John J. De Goey, CFP®, Fellow of the FPSC™ *Vice President & Associate Portfolio Manager - Burgeonvest Bick Securities Limited* **Defensive Tactics - Managing Portfolio Risk from the Mundane to the Manipulative** ***Annopolis Room***	**John Easton** *Director, Product Management & Strategic Relations - Maximizer Software* **Making the Shift: 5 Dangers of Ignoring CRM** ***Sable Ballroom AB***
	Dino Bourdos, CFA *Managing Director - TD Asset Management Inc.* **Protecting Capital with Derivatives** ***NS Ballroom***	**Dr. Jerry Singleton**, BA, MSc, Ph.D *Professor Leisure Studies - Dalhousie University* **Changing Demographics Changing Patterns of Retirement: Shifting Perspectives** ***Sable Ballroom CD***
12:15 p.m.	**CIFPs Annual General Meeting** (attendees eligible for 2015 Conference draw)	***Acadia Ballroom***
	or **Exhibitor Break**	***Exhibitor Area***
1:00 p.m. – 1:45 p.m.	Lunch *sponsored by Manulife Financial* **Introduction to the Advanced Financial Planning Stream** (1:20 p.m. - 1:45 p.m.)	***NS Ballroom***
1:45 p.m.	**Kevin Headland** *Director, Portfolio Advisory Group - Manulife Asset Management* **Going Global? Don't Ignore the U.S.**	***NS Ballroom***

2:45 p.m. – 3:45 p.m.	**Concurrent Education Sessions**	
	M. Claudia Morrow *Vice-President, Corporate Affairs,* *General Counsel and Corporate Secretary -* *Canada Deposit Insurance Corporation* **CDIC's New Role as Canada's Resolution Authority** ***Annopolis Room***	**Mike Veinot**, CFA *Vice President of Regional Sales, Atlantic Canada - BMO Global Asset Management* **Business-Building using Linkedin** ***Acadia Ballroom***
	Dr. Donald Shiner, CD, BSc, MBA, Ph.D *Associate Professor - Mount Saint Vincent University* **Understanding the Complexities of Decision Making as We Age** ***Sable Ballroom CD***	**Advanced Financial Planning Case Study** **Inheritances and their Impact on Investment Planning** ***NS Ballroom***
3:45 p.m. – 4:45 p.m.	Sponsor Networking and Refreshment Break *sponsored by BMO Mutual Funds*	***Exhibitor Area***
4:45 p.m. - 5:45 p.m.	**David Madani** *Canada Economist - Capital Economics* **Can Canada's Economy Survive a Housing Downturn?**	***NS Ballroom***
7:00 p.m. – 9:00 p.m.	Dinner after exploring the **Canadian Museum of Immigration at Pier 21** *sponsored by Sun Life Financial* *5:45 p.m. - 7:30 p.m.* *• Buses loop to the venue from the conference hotel.* *7:30 p.m. - 10:00 p.m.* *• Buses loop from the venue back to the conference hotel.*	

Tuesday June 10, 2014

7:00 a.m.	Breakfast *sponsored by Fidelity Investments*	***NS Ballroom***
7:30 a.m.	**Greg Smith** *Wall Street Insider and Former Goldman Sachs Executive* **Why I left Goldman Sachs**	***NS Ballroom***
8:30 a.m.	**Jamie Golombek**, CA, CPA, CFP®, CLU, TEP *Managing Director, Tax & Estate Planning - Renaissance Investments* **Tax Me Now…Or Tax Me Never!**	***NS Ballroom***
9:30 a.m.	**Peter Drake** *Vice President, Retirement & Economic Research - Fidelity Investments Canada* **Retirement 20/20: Controlling Risks, Taking Action**	***NS Ballroom***
10:30 a.m. – 11:00 a.m.	Exhibitor and Refreshment Break *sponsored by PlanPlus Inc.*	***Exhibitor Area***
11:00 a.m.	**Shawn Brayman** *President - PlanPlus Inc.* **Robert Reid**, APFS, ACII, CFP® *Director - Principal Syndaxi Chartered Financial Planners UK* **Gamma, Advisor Alpha, Zeta - How to Add Value through Advice and Measure It for a Client**	***NS Ballroom***
12:00 p.m. – 1:00 p.m.	**Concurrent Education Sessions**	
	George Hartman, MBA *Managing Partner - ELITE Advisors Canada Inc.* **Advisor Succession Planning for Business** ***Annopolis Room***	**James W. Kraft**, CPA, CA, MTax, CFP®, TEP *PlanningWise Inc.* **Insurance Strategies in Business Succession Planning** ***Sable Ballroom AB***
	Jennifer Poon, CPA, CA, CFP® *Director, Advanced Planning - Wealth* *Sun Life Global Investments* **Tax Management in Retirement** ***Maximizing Retirement Income*** ***Acadia Ballroom***	**Nell Smith**, BA, CCDP, PRP *Retire to the Life You Design* **Beyond Golf: The 10 Best Tips to Prepare for a Fulfilling Retirement** ***Sable Ballroom CD***
1:00 p.m. – 2:00 p.m.	Lunch *sponsored by Investment Executive* **Patrick J. O'Meara**, MBA, CFP® *Chair, Accounting and Financial Services - Centennial College* **Introduction to the CIFP Securities Compliance Principles Program** (1:20 p.m. - 1:50 p.m.)	***NS Ballroom***

2:00 p.m.	**Richard Balance** and **Etienne-Rene Massie** *Employment and Social Development Canada (ESDC)* **The Registered Disability Savings Plan and the Canada Disability Savings Grant and Bond**	***NS Ballroom***
3:00 p.m.	**Cary List**, CPA, CA, CFP® *President & CEO - Financial Planning Standards Council (FPSC)* **Recognition of Financial Planning as a Profession**	***NS Ballroom***
4:00 p.m. – 4:30 p.m.	Exhibitor and Refreshment Break *sponsored by Financial Planning Standards Council*	
4:30 p.m. - 5:30 p.m.	**Concurrent Education Sessions**	
	Anthony Williams, CFP® *VIce President of Academic Affairs - Canadian Institute of Financial Planning (CIFP)* **Current Trends and Issues in Financial Planning** ***Acadia Ballroom***	
	Knut Larsen, cand.oecon., CFP®, FCSI *Partner - Brigus Learning Inc.* **Uncertainty and Risk in Retirement** ***Annopolis Room***	
	Advanced Financial Planning Case Study **Power of Attorney & the Legality of Joint Ownership Issues** (4:30 p.m. - 6:00 p.m.) ***NS Ballroom***	
7:00 p.m. – 9:00 p.m.	Buffet Dinner at the Marriott Harbourfront Hotel *sponsored by Dynamic Funds*	***Exhibitor Area & NS Ballroom***

Wednesday June 11, 2014

7:00 a.m.	Breakfast *sponsored by Mackenzie Investments*	***NS Ballroom***
7:30 a.m.	**Keith Costello** *President & CEO - Canadian Institute of Financial Planners (CIFPs)* **Conference Closing Remarks**	***NS Ballroom***
7:45 a.m.	**Michael "Pinball" Clemons** *CFL Legend | Toronto Argonauts Vice-Chairman* **All Heart**	***NS Ballroom***
8:45 a.m.	**Tim J. Cestnik**, CA, CPA, CFP®, TEP *President - Waterstreet Family Offices - presented by Dynamic Funds* **A Revolutionary Approach to Advising Clients**	***NS Ballroom***
9:45 a.m.	Exhibitor and Refreshment Break *sponsored by Marsh Canada*	***Exhibitor Area***
10:00 a.m. – 11:00 a.m.	**Concurrent Education Sessions**	
	Craig Clarke, CFP®, CLU, FCSI *Director, Regional Sales, Atlantic - Renaissance Investments* **Investment Ideas for 2014 and Beyond** ***Annopolis Room***	
	Jeff Spencer, CFP®, AMP *Vice President, National Sales - HomEquity Bank* **Providing Optimal Diversification and Tax Efficiency in Retirement using HomEquity** ***Sable Ballroom CD***	
	Larry Distillio *Director, Financial Advisor Business Management - Mackenzie Investments* **The New Disclosure Rules - Your Opportunity to Reinforce Your Value** ***Acadia Ballroom***	
	Erika Penner, CFP®, FICB, Dip.T., PRP, RRC®, MFA, FDS **The Global Retirement Phenomenon: Knowledge is Power** ***Sable Ballroom AB***	
	Advanced Financial Planning Case Study **Second Relationships & Estate Planning Issues** ***NS Ballroom***	
11:00 a.m. – 12:00 p.m.	**Concurrent Education Sessions**	
	Christy Sandles, B.A., LL.B *Senior Will and Estate Planner - Scotiatrust* **Andrée K. Godbout**, LL.B., LL.M. *Senior Will and Estate Planner - Scotiatrust* **Estate Planning Q & A** ***Annopolis Room***	
	Faisal Karmali, CDFA™, CFP®, MBA *presented by IDFA* **Grey Divorce: The Impact to Your Clients and Your Financial Planning Practice** ***Sable Ballroom CD***	
	Jim Randall, CGA *Tax Specialist - Canada Revenue Agency* **Hot Topics in Aggressive Tax Planning** ***Acadia Ballroom***	
	Freddi Dogterom, CCDP, CPT, PRP *Freddi Speaks!* **More Than Money!** ***Sable Ballroom AB***	
	Advanced Financial Planning Case Study **Case Wrap-up & Working with these clients within a Professional Financial Planning Practice** ***NS Ballroom***	
12:00 p.m.	Conference Adjourns	