



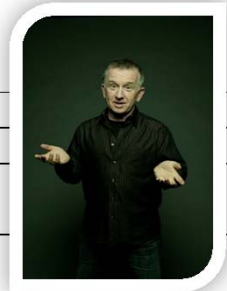
Building a strong profession today, for tomorrow  
The Canadian Institute of Financial Planners

## CIFPs 13<sup>th</sup> Annual National Conference - 2015

### PREPARING FOR A PERFECT REGULATORY STORM WITH A PLAN

The Westin Bayshore, Vancouver

June 3<sup>rd</sup> - 6<sup>th</sup>, 2015






#### Wednesday, June 03, 2015

4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception <i>sponsored by Renaissance Investments</i>	<b>Exhibitor Area</b>
7:00 p.m. – 9:30 p.m.	Opening Dinner <i>sponsored by Renaissance Investments</i> Opening Dinner Speaker: <b>Ron James</b> - Award-Winning Comedian and Satirist	<b>Salon ABC</b>



#### Thursday, June 04, 2015

7:00 a.m.	Breakfast <i>sponsored by TD Asset Management Inc.</i> Opening Remarks: <b>Tony Mahabir</b> , Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)	<b>Exhibitor Area / Salon ABC</b>
7:30 a.m.	<b>Jean Masson</b> <i>Managing Director and Portfolio Manager - TD Asset Management Inc.</i> <b>Managing for volatility!</b>	<b>Salon ABC</b> <b>Pending Approval</b>
8:30 a.m.	<b>Rebecca A. Cowdery</b> , LL.B., B.A. <i>Partner - Borden Ladner Gervais LLP</i> <b>50 Shades of Regulation – What Does an Advisor Have to Do in 2015 and 2016</b>	<b>Salon ABC</b> 
9:30 a.m.	<b>Douglas Porter</b> , CFA <i>Chief Economist and Managing Director - BMO Financial Group</i> <b>2015 Outlook: Tidal Shifts</b>	<b>Salon ABC</b> 
10:30 a.m. – 11:15 a.m.	Exhibitor and Refreshment Break <i>sponsored by B2B Bank</i>	<b>Exhibitor Area</b>
11:15 a.m. – 12:15 p.m.	<b>Concurrent Education Sessions</b>	
	<b>Steven Shepherd</b> , CFA <i>Vice President, Investment Strategist &amp; Portfolio Manager - BMO Global Asset Management</i> <b>Global Asset Allocation: Macro Drivers and Investable Themes</b>  <b>Salon ABC</b>	<b>Scott Vali</b> , CFA <i>Vice President, Equities - CIBC Asset Management Inc.</i> <b>Resource Markets</b>  <b>Cypress Room</b>
12:15 p.m.	<b>CIFPs Annual General Meeting</b> (attendees eligible for 2016 Conference draw) <b>or Exhibitor Break</b>	<b>Mackenzie Room</b> <b>Exhibitor Area</b>
1:00 p.m. – 1:45 p.m.	Lunch <i>sponsored by Dynamic Funds</i>	<b>Exhibitor Area / Salon ABC</b>
1:45 p.m.	<b>Mike Tycoles</b> , CFP® <i>Vice President, Business Development - Dynamic Funds</i> <b>Taking Your Business To Level 3: The Power of Process</b>	<b>Salon ABC</b> 
2:45 p.m. – 3:45 p.m.	<b>Concurrent Education Sessions</b>	
	<b>Doug Mackenzie</b> <i>Partnerships Director, HomeEquity Bank (CHIP)</i> <b>Preparing your Business to Meet the Evolving Needs of your Clients</b>  <b>Mackenzie Room</b>	<b>John Easton</b> <i>Director, Product Management &amp; Strategic Relations - Maximizer Software</i> <b>The 4 Pillars of Successful Wealth Management</b>  <b>Seymour Room</b>
		<b>Dr. Robert Brown</b> , BMath (Actuarial Science), MA and PhD (Gerontology), FCIA, FSA, ACAS, Hon FIA <i>Retired to Victoria, BC</i> <i>Presented by CIFP Retirement Institute</i> <b>Raising the Retirement Age: Issues and Unintended Consequences</b>  <b>Cypress Room</b>
3:45 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break <i>sponsored by HomeEquity Bank (CHIP)</i>	<b>Exhibitor Area</b>








4:30 p.m. - 6:00 p.m.	<b>Concurrent Advanced Financial Planning Sessions</b>	
	<p><b>Matt C. Altro</b>, B. Comm., F. Pl., CFP®(Canada &amp; US)  <i>President &amp; CEO - MCA Cross Border Advisors Inc.</i>  <b>David A. Altro</b>, B.A., LL.L., J.D., D.D.N., F. Pl., TEP  <i>Florida Lawyer &amp; Canadian Legal Advisor - Altro Levy LLP</i>  <b>Americans in Canada &amp; Canadians in America:</b>  <b>Cross-Border Planning for Your Client<sup>te</sup></b></p> <p style="text-align: right;">  <b>Salon ABC</b></p>	<p style="text-align: center;"><b>Thomas R. Barker</b>  <i>Professor - Centennial College</i>  <b>Portfolio Theory and Asset Management Strategies</b></p> <p style="text-align: right;">  <b>Cypress Room</b></p>
7:00 p.m. – 9:00 p.m.	<p>Buffet Dinner while enjoying the views and atmosphere of the Steam Works Brew Pub  <i>sponsored by BMO Financial Group</i></p> <p>6:00 p.m. - 7:30 p.m.      • Buses loop to the venue  from the conference hotel.</p> <p>7:30 p.m. - 11:00 p.m.      • Buses loop from the venue  back to the conference hotel.</p> 	

**Friday, June 05, 2015**

7:00 a.m.	Breakfast <i>sponsored by Investors Group</i>		<b>Exhibitor Area / Salon ABC</b>
7:30 a.m.	<p><b>Niels Veldhuis</b>  <i>President - Fraser Institute</i>  <b>Canadian Economic Outlook: Seizing Opportunity in an Uncertain World</b></p> 		<b>Salon ABC</b>
8:30 a.m.	<p><b>Jamie Golombek</b>, CA, CPA, CFP®, CLU, TEP  <i>Managing Director, Tax &amp; Estate Planning - Renaissance Investments</i>  <b>Tax Update 2015: What you need to know</b></p> 		<b>Salon ABC</b>
9:30 a.m.	<p><b>Jack Courtney</b>, B.A., LL.B., CFP®, TEP  <i>Vice-President, Private Client Planning - Investors Group</i>  <b>Freezing an Investment Portfolio – Tax Efficient Strategies for the Transfer of Wealth</b></p> 		<b>Salon ABC</b>
10:30 a.m. – 11:00 a.m.	Exhibitor and Refreshment Break <i>sponsored by Employment and Social Development Canada (ESDC)</i>		<b>Exhibitor Area</b>
11:00 a.m.	<p><b>Peter Drake</b>  <i>Vice President, Retirement &amp; Economic Research - Fidelity Investments Canada</i>  <b>The Economics of Retirement</b></p> 		<b>Salon ABC</b>
12:00 p.m. – 1:00 p.m.	<b>Concurrent Education Sessions</b>		
	<p><b>Nicole Garton</b>, B.A., LL.B./J.D.  <i>Lawyer, Mediator and Parenting Coordinator, Founder and Managing Partner - Heritage Law</i>  <b>Family Business Succession: What You Need to Know to Effectively Advise Business Owner Clients</b></p>  <b>Mackenzie Room</b>	<p><b>Joanna Reid</b>  <i>Senior Vice President - MARSH Canada Limited</i>  <b>Professional Liability- What you really need to know about your policy</b></p>  <b>Seymour Room</b>	<p><b>Carien Jutting</b>, CFP®, P.R.P., CEBS  <i>Fiscal Wellness</i>  <i>Presented by CIFP Retirement Institute</i>  <b>The Value of Integrating Life &amp; Money</b></p>  <b>Cypress Room</b>
	Lunch <i>sponsored by Fidelity Investments Canada</i>		
1:00 p.m. – 2:15 p.m.	<p><b>Anthony Williams</b>, CFP®  <i>Vice President of Academic Affairs - Canadian Institute of Financial Planning (CIFP)</i>  <b>Ethical Conduct for CFP® Professionals</b> ( 1:15 p.m. - 2:15 p.m. )</p> 		<b>Exhibitor Area / Salon ABC</b>
2:15 p.m.	<p><b>The Honourable Candice Bergen</b>, P.C., M.P.  <i>Minister of State (Social Development)</i>  <b>Registered Disability Savings Plan</b></p>		<b>Salon ABC</b>
2:45 p.m.	<p><b>Cary List</b>, CPA, CA, CFP®  <i>President &amp; CEO - Financial Planning Standards Council (FPSC)</i>  <b>Public Policy Ambassador Program &amp; the Coalition's Framework for Professional Recognition</b></p> 		<b>Salon ABC</b>
3:45 p.m. – 4:30 p.m.	Exhibitor and Refreshment Break <i>sponsored by Financial Planning Standards Council</i>		<b>Exhibitor Area</b>

4:30 p.m. - 6:00 p.m.	<b>Concurrent Advanced Financial Planning Sessions</b>	
	<b>Patrick O'Meara</b> <i>Professor - Southern Alberta Institute of Technology</i> <b>The CFP Professional: At the Nexus of Debt and Wealth?</b>  <b>Salon ABC</b>	<b>Knut Larsen, cand.oecon., CFP®, FCSI</b> <i>Partner - Brigus Group</i> <b>Principles of Annuities - A Mathematical Foundation</b>  <b>Cypress Room</b>
7:00 p.m. - 9:00 p.m.	Buffet Dinner at the Pool-Garden Area in the Bayshore Westin <i>sponsored by CIFP Retirement Institute</i>	
		<b>Currents Restaurant &amp; Pool-Garden Area</b>

**Saturday, June 06, 2015**

7:00 a.m.	Breakfast sponsored by Manulife Financial and Manulife Securities		<b>Exhibitor Area / Salon ABC</b>
7:30 a.m.	<b>Keith Costello</b> <i>President &amp; CEO - Canadian Institute of Financial Planners (CIFPs)</i> <b>Conference Closing Remarks</b>		<b>Salon ABC</b>
7:45 a.m.	<b>Warren MacDonald</b> <i>Motivational Speaker - Shifting Your Perception On Change</i> <b>Challenge of Change – Finding Opportunity in Adversity</b>	<b>Salon ABC</b>	
8:45 a.m.	<b>Shawn Brayman</b> <i>President - PlanPlus Inc.</i> <b>Paul Resnik</b> <i>Co-founder - FinaMetrica</i> <b>Gordon Gibson</b> <i>Retired from National Bank Financial</i> <b>Panel Discussion: Anatomy of a Robo-Advisor - Where does advisor value start and stop?</b>	<b>Salon ABC</b>	
9:45 a.m.	Exhibitor and Refreshment Break sponsored by Maximizer Software		
10:00 a.m. - 11:00 a.m.	<b>Concurrent Education Sessions</b>		
	<b>Mike Steele, CFP®, CLU, CH.F.C.</b> <i>Senior Consultant, Financial Planning - Manulife Securities</i> <b>Interactive Case Studies – Are your clients ready for whatever life brings?</b>  <b>Mackenzie Room</b>	<b>Francis Tan and Ash Kotadia</b> <i>Business Development Managers - B2B Bank</i> <b>Understanding Investment Lending and its use within your Practice</b>  <b>Seymour Room</b>	<b>Neil Sharpham, BComm, CFP, PRP</b> <i>Nova Retirement Planning Group</i> <i>Presented by CIFP Retirement Institute</i> <b>So you want to put on Retirement Planning Workshops</b>  <b>Cypress Room</b>
11:00 a.m. - 12:00 p.m.	<b>Concurrent Education Sessions</b>		
	<b>Damian Borges, CFP®, CLU, CH.F.C.</b> <b>The Art &amp; Science of Financial Decision Making</b>  <b>Mackenzie Room</b>	<b>Robert Reid, APFS, ACII, CFP®</b> <i>Director - Principal Syndaxi Chartered Financial Planners UK</i> <b>What have you done for me lately</b>  <b>Seymour Room</b>	<b>Freddi Dogterom, CCDP, CPT, PRP</b> <i>Freddi Speaks!</i> <i>Presented by CIFP Retirement Institute</i> <b>Juggling the Jingle in Your Genes</b>  <b>Cypress Room</b>
12:00 p.m.	Conference Adjourns		