



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

CIFPs 14th Annual National Conference - 2016

CANADA – A CLEAR PLAN FOR THE WORLD

Conference Agenda

Wednesday, May 18, 2016


4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception <i>sponsored by BMO Global Asset Management Inc.</i>	Exhibitor Area
7:00 p.m. – 9:30 p.m.	Opening Dinner <i>sponsored by BMO Global Asset Management Inc.</i> Opening Dinner Speaker: John Wing - Comedian & Author	Southern Hemisphere II & III

Thursday, May 19, 2016

7:00 a.m.	Breakfast <i>sponsored by TD Asset Management Inc.</i> Opening Remarks: Jim Boylan , Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)	Exhibitor Area / Southern Hemisphere II & III	
7:30 a.m.	Jean Masson , Ph.D. Managing Director - TD Asset Management Inc. An Innovative Approach to Lower Portfolio Risk	Southern Hemisphere II & III	
8:30 a.m.	Jan F. Kallmorgen Partner and Head of Investor Advisory - Interel Group Geopolitics - International Security, Future of Europe and Transatlantic Relations	Southern Hemisphere II & III	
9:30 a.m.	John Natale , LL.B., B.Comm., EPC, CFP® Assistant Vice President of Tax, Retirement & Estate Planning Services and Advanced Sales Concepts - Manulife Financial Making Sense of Corporate Taxation	Southern Hemisphere II & III	
10:30 a.m. – 11:15 a.m.	Exhibitor and Refreshment Break <i>sponsored by B2B Bank</i>	Exhibitor Area	
11:15 a.m.	Anthony Williams , CFP®, RRC® Vice President of Academic Affairs - Canadian Institute of Financial Planning (CIFP) Current Trends and Issues in Financial Planning	Southern Hemisphere II & III	
12:00 p.m. – 1:00 p.m.	Concurrent Education Sessions		
	Evan Serton , MBA, BA Vice President, Relationship Manager at Cohen & Steers - Renaissance Investments Global Real Estate Securities	Robert Armstrong , MBA, MSc., CFA Vice President, Head of Managed Solutions Global Structured Investments Group - BMO Global Asset Management Inc. Successful Investing in Retirement	Northern Hemisphere E-4
1:00 p.m. – 1:45 p.m.	Lunch <i>sponsored by Manulife Investments</i>	Exhibitor Area / Southern Hemisphere II & III	
1:45 p.m.	Jamie Golombek , CA, CPA, CFP®, CLU, TEP Managing Director, Tax & Estate Planning - Renaissance Investments Tax Update 2016	Southern Hemisphere II & III	
2:45 p.m. – 3:45 p.m.	Concurrent Education Sessions		
	Judy Byle-Jones , CFP®, CLU, CDFA, ChFC, RN Judy Byle-Jones Financial Group Add Value to your Clients going through a Divorce	Robert Reid , APFS, ACII, CFP® Director - Principal Syndaxi Chartered Financial Planners UK Don't Keep Succession a Secret	I.J. (Ida-Jean) McIntyre , BA, JD, P.R.P., RRC® Lifestyle Planning Workshop Facilitator CIFP Retirement Institute Where will they Live? Helping Clients Choose their Happy Place for Retirement
	Northern Hemisphere E-4	Southern Hemisphere IV	Southern Hemisphere V
3:45 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break <i>sponsored by Maximizer Software</i>	Exhibitor Area	

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4:30 p.m. - 6:00 p.m.	Concurrent Advanced Financial Planning Sessions	
	<p style="text-align: center;">Carolyn M. Fallis, MTax, CPA, CA, CFP®, Fellow of FPSC <i>Professor, School of Accounting and Finance - George Brown College</i></p> <p style="text-align: center;">Income Tax Planning: Not as Taxing as You May Think</p> <p style="text-align: center;">1.5 Northern Hemisphere E-4</p>	<p style="text-align: center;">Brad Bishop, MBA, CFP® <i>Professor, Financial Planning - Lawrence Kinlin School of Business : Fanshawe College</i></p> <p style="text-align: center;">Human Nature and Investment Decisions</p> <p style="text-align: center;">1.5 Southern Hemisphere IV</p>
7:00 p.m. – 9:00 p.m.	<p style="text-align: center;">Buffet Dinner on the White Sand Beach at the Walt Disney World Swan and Dolphin Resort sponsored by Renaissance Investments</p>	
		








Friday, May 20, 2016

7:00 a.m.	Breakfast sponsored by Investors Group		Exhibitor Area / Southern Hemisphere II & III
7:30 a.m.	<p>Heather Compton, CIM, PFP, FCSI and Dennis Blas <i>Co-authors of the Award Winning Book, "Retirement Rocks! - Canadian Boomers Invest in Life"</i></p> <p>Retirement Rocks! Presents Beyond "The Bucket List"</p>		Southern Hemisphere II & III
8:30 a.m.	<p>Michael Gregory, CFA <i>Deputy Chief Economist and Head of U.S. Economics - BMO Capital Markets</i></p> <p>Out of the Oil Slick, onto U.S. Coattails</p>		Southern Hemisphere II & III
9:30 a.m.	<p>Anthony Williams, CFP®, RRC® <i>Vice President of Academic Affairs - Canadian Institute of Financial Planning (CIFP)</i></p> <p>Ethical Conduct for CFP® Professionals</p>		Southern Hemisphere II & III Pending Approval
10:30 a.m. – 11:00 a.m.	Exhibitor and Refreshment Break sponsored by Manulife Bank and Manulife Securities		Exhibitor Area
11:00 a.m.	<p>Peter Bowen, CPA, CA <i>Vice-President, Tax and Retirement Research - Fidelity Investments Canada</i></p> <p>The Evolution of Financial Planning Today</p>		Southern Hemisphere II & III
12:00 p.m. – 1:00 p.m.	Concurrent Education Sessions		
	<p style="text-align: center;">Jeff Spencer, CFP® <i>Vice President, Retail Sales - Manulife Bank</i></p> <p style="text-align: center;">Real Estate as an Active Asset in your Client's Portfolio</p> <p style="text-align: center;">1.5 Northern Hemisphere E-4</p>	<p style="text-align: center;">Michelle Hastick-Cowell, B.Sc., PFP, E.P.C., C.D.F.A. <i>Senior Investment Advisor - HollisWealth</i></p> <p style="text-align: center;">Mahad Mohamed, MBA, CA, CPA, TEP, CIPFA <i>Partner - Tax Partners</i></p> <p style="text-align: center;">Insurance Changes, Tax Implications and Changes to Trust Laws and How they will Affect your Clients</p> <p style="text-align: center;">1.5 Southern Hemisphere IV</p>	<p style="text-align: center;">Vickie Townson, CPCC, PCC <i>Midlife Coach - Life's New Chapter Coaching</i></p> <p style="text-align: center;">Retirement - 5 Keys to an Easy Transition</p> <p style="text-align: center;">1.5 Southern Hemisphere V</p>
1:00 p.m. – 1:45 p.m.	Lunch sponsored by Fidelity Investments Canada		Exhibitor Area / Southern Hemisphere II & III
1:45 p.m.	<p>Joanna Reid <i>Senior Vice President - MARSH Canada Limited</i></p> <p>Stephen J. Ritter, FCIP, CRM <i>Senior VP of Swiss Re Corporate Solutions & Chief Agent - Westport Insurance Corporation</i></p> <p>The Reality of Risk: How to Avoid Claims and Protect your Business</p>		Southern Hemisphere II & III
2:15 p.m.	<p>Cary List, CPA, CA, CFP® <i>President & CEO - Financial Planning Standards Council (FPSC)</i></p> <p>The Future of the Financial Planning Profession</p>		Southern Hemisphere II & III
3:15 p.m. – 4:00 p.m.	Exhibitor and Refreshment Break sponsored by MARSH Canada Limited		Exhibitor Area
4:00 p.m. - 5:30 p.m.	Concurrent Advanced Financial Planning Sessions		
	<p style="text-align: center;">Patrick O'Meara, CFP®, CMA, MBA <i>Professor - Southern Alberta Institute of Technology</i></p> <p style="text-align: center;">Alternative Trading and Income Strategies</p> <p style="text-align: center;">1.5 Northern Hemisphere E-4</p>	<p style="text-align: center;">Knut Larsen, cand.oecon., CFP®, FCSI <i>Partner - Brigus Learning Inc.</i></p> <p style="text-align: center;">Why Monetary Policy Has Become Impotent – 3 Possible Cures</p> <p style="text-align: center;">1.5 Southern Hemisphere IV</p>	
6:30 p.m. – 8:30 p.m.	<p style="text-align: center;">Buffet Dinner at the Atlantic Dance Hall on Disney's Boardwalk sponsored by CIFP Retirement Institute</p>		

Saturday, May 21, 2016

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7:00 a.m.	Breakfast sponsored by <i>Sun Life Financial</i>		<i>Exhibitor Area / Southern Hemisphere II & III</i>
7:30 a.m.	Keith Costello <i>President & CEO - Canadian Institute of Financial Planners (CIFPs)</i> Conference Closing Remarks		<i>Southern Hemisphere II & III</i>
7:45 a.m.	David Frum <i>High-profile Political Analyst, Senior Editor at The Atlantic</i> The Political Landscape		<i>Southern Hemisphere II & III</i>
8:45 a.m.	Kevin R. Bandelow <i>Assistant Vice President, Estate and Financial Planning Services - Sun Life Financial</i> 2017 Tax Change Opportunities		<i>Southern Hemisphere II & III</i> 
9:45 a.m.	Exhibitor and Refreshment Break sponsored by <i>PlanPlus Inc.</i>		<i>Exhibitor Area</i>
10:00 a.m. – 11:00 a.m.	Concurrent Education Sessions		
	Neil Pickup <i>Senior Manager, National Distribution - B2B Bank</i> Understanding Investment Lending and its Use within Your Practice  <i>Northern Hemisphere E-4</i>	Thomas R. Barker <i>Professor & Coordinator, Financial Services - Centennial College</i> Fearful of Derivatives & Hedge Funds?  <i>Southern Hemisphere IV</i>	Shawn Brayman <i>President - PlanPlus Inc.</i> Current Practices for Risk Profiling in Canada and Review of Global Best Practices  <i>Southern Hemisphere V</i>
11:00 a.m. – 12:00 p.m.	Concurrent Education Sessions		
	John Easton <i>Director, Product Management & Strategic Relations - Maximizer Software</i> How to Stay Compliant in the Era of CRM 2.0  <i>Northern Hemisphere E-4</i>	Steve Bang, B.A., M.B.A., CFP®, Fellow of FPSC <i>Professor of Business - Humber College</i> Making Credit Work for Your Customers  <i>Southern Hemisphere IV</i>	Darryl Robinson, R.S.W., CFP®, P.R.P., R.F.P., RRC® <i>Financial Educator & Planner - D. Robinson & Associates Inc.</i> Severance Planning: The Good, The Bad, and The Ugly  <i>Southern Hemisphere V</i>
12:00 p.m.	Conference Adjourns		