



Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

CIFPs 15th Annual National Conference - 2017

Canada - Planning for Another 150 Years

The Westin Ottawa, Ontario

May 28th - 31st, 2017

Educational Streams Focusing On:

- Retirement and Lifestyle Planning
presented by the CIFP Retirement Institute
- Risk Management
- Advanced Financial Planning

Conference Agenda









Sunday, May 28, 2017

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| 4:30 p.m. | Conference Registration & Check-in | |
| 6:00 p.m. | Cocktail Reception sponsored by Investors Group | Exhibitor Area |
| 7:00 p.m. – 9:30 p.m. | Opening Dinner sponsored by Investors Group Opening Dinner Speaker: Darrin Rose - Canadian Standup, one of the stars of Mr. D | Confederation Ballroom |




Monday, May 29, 2017

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| 7:00 a.m. | Breakfast sponsored by TD Asset Management Inc. Opening Remarks: Jim Boylan , Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs) PlanPlus Canada Financial Planning Awards Presentation | Exhibitor Area / Confederation Ballroom |
| 7:30 a.m. | Michael Craig , CFA Vice President & Director - TD Asset Management Inc. New Thinking: Not Your Parents Real Estate Market | Confederation Ballroom  |
| 8:30 a.m. | Douglas Porter , CFA Chief Economist and Managing Director - BMO Financial Group Economic Perspective and Outlook | Confederation Ballroom  |
| 9:30 a.m. | Carlos Cardone Senior Managing Director - Strategic Insight Jeff Spencer Vice President, Retail Sales - Manulife Bank and Trust Who is managing your clients' favourite asset in retirement? | Confederation Ballroom  |
| 10:30 a.m. – 11:15 a.m. | Exhibitor and Refreshment Break sponsored by HomeEquity Bank | Exhibitor Area |
| 11:15 a.m. | Andrew Buntain , CFA Vice President, Institutional Portfolio Manager - Franklin Bissett Investment Management Braydon Scully Senior Vice President, Investment Platform Division - Franklin Templeton Investments Corp. Homegrown Solutions for an Evolving Market | Confederation Ballroom  |


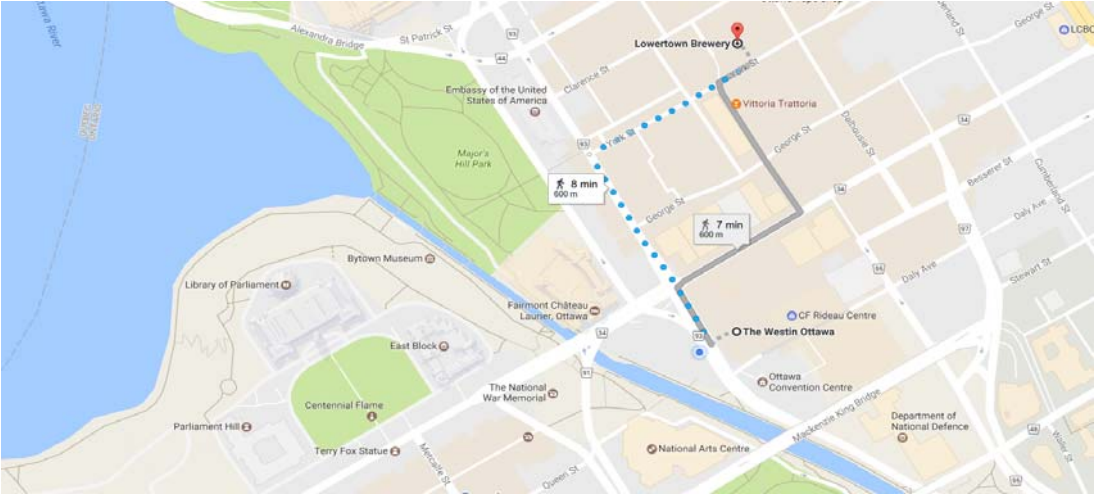
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| 12:15 p.m. – 1:15 p.m. | Concurrent Education Sessions | | |
| | Richard Poulin , CIM, FMA, FCSI <i>Vice President, Regional Sales - BMO Global Asset Management</i> “The Evolutionary Advisor”  Confederation III | Sheryl Troup , CPA, CA <i>Director, Tax & Estate Planning - Investors Group</i> The Great Deferral: Compensation Planning in a High Tax Rate Environment  Governor General I | Corinne Lavictoire <i>CEO, Author & Speaker - Inex Insight</i> Helping Clients Administer Estates Pending Approval  Governor General II |
| 1:15 p.m. – 2:00 p.m. | Lunch sponsored by Fidelity Investments Canada Exhibitor Area / Confederation Ballroom | | |
| 2:00 p.m. | Peter Bowen , CPA, CA <i>Vice-President, Tax and Retirement Research - Fidelity Investments Canada</i> Retirement 150 Confederation Ballroom  | | |
| 3:00 p.m. – 4:00 p.m. | Concurrent Education Sessions | | |
| | Eric Strong <i>President - 4Cast Services Inc.</i> Financial Services Cyber Risk & Compliance Pending Approval Confederation III | Anthony Williams , CFP®, RRC® <i>Vice President of Academic Affairs - Canadian Institute of Financial Planning (CIFP)</i> Current Trends and Issues in Financial Planning Pending Approval Governor General I | Lorraine Clemes , EdD, P.R.P., CPCA <i>Certified Coach, Facilitator, Author - Life Design Consultants</i> What Your Clients Aren't Telling You - and the Benefits of You Finding Out  Governor General II |
| 4:00 p.m. - 4:30 p.m. | Exhibitor and Refreshment Break sponsored by B2B Bank Exhibitor Area | | |
| 4:30 p.m. - 6:00 p.m. | Concurrent Advanced Financial Planning Sessions (additional CE credits available) | | |
| | Carolyn M. Fallis , MTax, CPA, CA, CFP®, Fellow of FPSC <i>Professor, School of Accounting and Finance - George Brown College</i> Retirement – Will they be your “Golden years”?  Governor General I | Patrick O'Meara , RRC®, CFP®, CMA®, CPA®, MBA <i>Principal - The Innovative Scholar</i> FOREX and the Retail Investor  Governor General II | |
| 7:00 p.m. – 9:00 p.m. | Dinner at the Canadian Museum of History <i>sponsored by BMO Financial Group</i> 5:30 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, May 30, 2017



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| 7:00 a.m. | Breakfast sponsored by Manulife Investments Exhibitor Area / Confederation Ballroom | | |
| 7:30 a.m. | John Baird <i>Former Canadian Minister of Foreign Affairs</i> Confederation Ballroom Pending Approval | | |
| 8:30 a.m. | Christine Van Cauwenberghe , B. Comm. (Hons), LL. B., TEP, CFP®, RRC® <i>Vice-President, Tax & Estate Planning, Advanced Financial Planning - Investors Group</i> Confederation Ballroom Estate Planning Considerations for High Net Worth Clients  | | |
| 9:30 a.m. | Sébastien Lavoie <i>Chief Economist - Laurentian Bank Securities</i> Confederation Ballroom Economic and Financial Outlook  | | |
| 10:30 a.m. – 11:15 a.m. | Exhibitor and Refreshment Break sponsored by Sprott Asset Management Exhibitor Area | | |
| 11:15 a.m. | Dennis Mitchell , BBA, MBA, CFA <i>Senior Vice President, Senior Portfolio Manager - Sprott Asset Management</i> Confederation Ballroom Global Equities, Real Estate & Infrastructure  | | |

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| 12:15 p.m. – 1:15 p.m. | Concurrent Education Sessions | | |
| | <p>Kevin Headland, CIM <i>Senior Investment Strategist - Manulife Investments</i> Objectives-Based Asset Allocation and Market Update</p> <p> Confederation III</p> | <p>Robert Handelman, CFP®, CPA, CA, CIM, BBA <i>Vice President, Wealth & Tax - Natixis Global Asset Management</i> Advanced Tax & Financial Planning Ideas to Attract HNW Clients</p> <p> Governor General I</p> | <p>Robin MacDonald, B.A., CLU, P.R.P. <i>Business Development Manager - Ontario Teachers Insurance Plan</i> Beyond The Numbers - How Helping Your Clients With Their Life Planning Can Pay Big Dividends</p> <p> Governor General II</p> |
| 1:15 p.m. – 2:30 p.m. | <p>Lunch sponsored by Sentry Investments Exhibitor Area / Confederation Ballroom</p> <p>Anthony Williams, CFP®, RRC® <i>Vice President of Academic Affairs - Canadian Institute of Financial Planning (CIFP)</i> Ethical Conduct for CFP® Professionals (1:30 p.m. - 2:30 p.m.) Pending Approval</p> | | |
| 2:30 p.m. | <p>Cary List, CPA, CA, CFP® Confederation Ballroom</p> <p><i>President & CEO - Financial Planning Standards Council (FPSC)</i> The Big Think </p> | | |
| 3:00 p.m. | <p>James Dutkiewicz, B.A., CFA Confederation Ballroom</p> <p><i>Chief Investment Strategist and Senior Portfolio Manager - Sentry Investments</i> The Benefits of Goals-Based Solutions and Asset Allocation Pending Approval</p> | | |
| 4:00 p.m. – 4:30 p.m. | Exhibitor and Refreshment Break sponsored by Natixis Global Asset Management Exhibitor Area | | |
| 4:30 p.m. - 6:00 p.m. | Concurrent Advanced Financial Planning Sessions (additional CE credits available) | | |
| | <p>Dr. John Harris, Ph.D, CGA, FCPA <i>Professor, Financial Planning and Accounting - Seneca College</i> The Family Business – Tax Issues & Succession Planning</p> <p> Governor General I</p> | <p>Trevor R. Parry, M.A., LL.B., LL.M (Tax), TEP <i>President - TRP Strategy Group</i> Tax Planning in the Era of Trudeau</p> <p>Pending Approval Governor General II</p> | |
| 7:00 p.m. – 9:00 p.m. | <p>Dinner at the Lowertown Brewery and Sens House in the historic ByWard Market sponsored by Scotiabank</p> <p style="text-align: center;"><i>The venue is a short walk from the hotel in the ByWard Market and you may arrive between 6:00 p.m. and 7:30 p.m.</i></p> | |  |
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Wednesday, May 31, 2017

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| 7:00 a.m. | Breakfast sponsored by Franklin Templeton Investments <i>Exhibitor Area / Confederation Ballroom</i> | |
| | Closing Remarks: Keith Costello , <i>President & CEO - Canadian Institute of Financial Planners (CIFPs)</i> | |
| 8:00 a.m. | Myles Zyblock , B.A. (Hons.), M.A., CFA <i>Chief Investment Strategist - 1832 Asset Management L.P. - Scotiabank</i> Global Portfolio Strategy: Opportunity and Risk  <i>Confederation Ballroom</i> | |
| 9:00 a.m. | Steve Ranson <i>President & CEO - HomeEquity Bank</i> An Untapped Partnership: Helping Canadians with Prudent Retirement Planning <i>Confederation Ballroom</i> <i>Pending Approval</i> | |
| 10:00 a.m. | Exhibitor and Refreshment Break sponsored by CIFP Retirement Institute <i>Exhibitor Area</i> | |
| 11:00 a.m. – 12:00 p.m. | Concurrent Education Sessions | |
| | Curtis McCone <i>President of Wealth Management and Employee Benefits - HUB International Ontario</i> Canadian employee benefits landscape: Current Realities <i>Pending Approval</i> <i>Confederation III</i> | Shawn Brayman <i>President - PlanPlus Inc.</i> What constitutes professional judgment? <i>Pending Approval</i> <i>Governor General I</i> |
| | | Robert Reid , APFS, ACII, CFP® <i>Director - Principal Syndaxi Chartered Financial Planners UK</i> "Should I stay or should I go?" the succession conundrum <i>Pending Approval</i> <i>Governor General II</i> |
| 12:00 p.m. – 1:00 p.m. | Concurrent Education Sessions | |
| | Mahad Mohamed , M.Ba., C.A, C.P.A., T.E.P. <i>Tax Partners Inc. - Partner</i> Navigating through the many changing and challenging world of estate tax for clients <i>Pending Approval</i> <i>Confederation III</i> | John J. De Goey , CIM, CFP®, Fellow of the FPSC™ <i>Portfolio Manager - Industrial Alliance Securities Inc.</i> Traditional Active Management, SMART Beta and Traditional Passive (pure beta) Products and Strategies  <i>Pending Approval</i> <i>Governor General I</i> |
| | | Jim Yih , B.Comm, P.R.P. <i>Financial Educator, Best Selling Author, Writer, Speaker - RetireHappy.ca</i> The Secret to a Happy and Successful Retirement is About More Than Just Money <i>Pending Approval</i> <i>Governor General II</i> |
| 1:00 p.m. | Conference Adjourns | |