



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

CIFPs 16th Annual National Conference - 2018

A New Plan to Trade

Halifax Marriott Harbourfront – Nova Scotia

Sunday June 10th - Wednesday June 13th

Educational Streams Focusing On:



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

Conference Agenda

Sunday, June 10, 2018

4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception <i>sponsored by Investors Group</i>	Exhibitor Area
7:00 p.m. – 9:30 p.m.	Opening Dinner <i>sponsored by Investors Group</i> Opening Dinner Speaker: Rex Murphy - <i>Social Commentator, Editorialist & Distinct Canadian Voice</i>	Nova Scotia Ballroom

Monday, June 11, 2018

7:00 a.m.	Breakfast <i>sponsored by Picton Mahoney</i> Opening Remarks: Jim Boylan , <i>Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)</i> PlanPlus Canada Financial Planning Awards Presentation	Exhibitor Area / Nova Scotia Ballroom
7:30 a.m.	Dr. Jack Mintz <i>World-Renowned Economist, Academic & Public Policy Analyst</i> Unleashing a North American Tiger: Canada-U.S. Economic Integration and the Implications for Business	Nova Scotia Ballroom 
8:30 a.m.	Tony Mahabir , MBA, CMC, CIM, RRC®, CFP® <i>President - Convention of Independent Financial Advisors ("CIFA")</i> Global Trends of The Financial Planning Profession!	Nova Scotia Ballroom 
9:30 a.m.	Jean-Pierre Diserens <i>Secretary-General - Convention of Independent Financial Advisors ("CIFA")</i> Frank Paré , CFP® <i>President - Financial Planning Association (FPA)</i>	Nova Scotia Ballroom
10:00 a.m. – 10:45 a.m.	Exhibitor and Refreshment Break <i>sponsored by Investment Executive</i>	Exhibitor Area
10:45 a.m.	CIFP Case Challenge - National Competition <i>Earlier this spring, teams representing colleges from across the country squared off in the annual CIFPs Case Challenge Competition in two regional events hosted in Calgary and Toronto. The Case Challenge is open to students enrolled in a financial services program at their academic institution. Based on a case study dealing with a couple facing real life financial issues, opportunities and constraints, teams went toe-to-toe analyzing the situation of the mock clients and developing financial plans to help them achieve their goals. As is always the case, the Case Challenge was closely contested but, Winnipeg's Red River College emerged victorious in western Canada while Toronto's Centennial College were the champions of eastern Canada. The stage is now set for these two titans to battle it out mano a mano...to determine who will raise the trophy and lay claim to the title of national champions of the 2018 CIFPs Case Challenge...and you, the Conference delegates in attendance, will play a role in choosing the winner (details to follow). Which team will reign supreme? It promises to be an epic battle royale on the main stage...the only thing missing is the cage!</i>	Nova Scotia Ballroom Pending Approval

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	<p>Western Regional Winners</p> <p>Red River College Shelby Joss Vitor Machado E Melo Virginia Giesbrecht Coach: Maria Vincenten</p>	<p>Eastern Regional Winners</p> <p>Centennial College Simone Hudson Bernard Augusto Barbosa Arraes Stanley Emenike Coach: Deborah Williams Coach: Lyle Van Every</p>	
12:15 p.m. – 1:15 p.m.	Concurrent Education Sessions		
	<p>Sheryl Troup, CPA, CA, TEP, CFP® Director, Tax and Estate Planning - Investors Group Tax and Estate Planning for Farmers and Fishers</p> <p> Sable Ballroom</p>	<p>Myles Zyblock, B.A. (Hons.), M.A., CFA Chief Investment Strategist - 1832 Asset Management L.P. - Scotiabank Are You Prepared? Avoiding the "Uncle Point"</p> <p> Acadia Ballroom</p>	<p>Mark Venning Researcher, Advisor, Speaker & Blogger - Change Rangers "Recoding a Longevity Society" Changing Client Conversations: Mind-set Shift, Financing for Longevity</p> <p> Annapolis Room</p>
1:15 p.m. – 2:00 p.m.	Lunch sponsored by Fidelity Investments Canada		
2:00 p.m.	<p>Peter Bowen, CPA, CA Vice-President, Tax and Retirement Research - Fidelity Investments Canada The Future of Retirement: Is your Retirement Planning keeping pace?</p> <p style="text-align: right;"> Nova Scotia Ballroom</p>		
3:00 p.m. – 4:00 p.m.	Concurrent Education Sessions		
	<p>Trevor R. Parry, M.A., LL.B., LL.M (Tax), TEP President - TRP Strategy Group Providing Tax Relief</p> <p> Sable Ballroom</p>	<p>Patrick O'Meara, RRC®, CFP®, CMA®, CPA®, MBA Senior Director, Training Services - Canadian Institute of Financial Planning (CIFP) Current Trends and Issues in Financial Planning</p> <p> Acadia Ballroom</p>	<p>Elaine Froese, CSP, CAFA, CHICoach Professional Speaker, Writer & Farm Family Coach Discuss the Undiscussabull: Tools for Tough Conversations</p> <p> Annapolis Room</p>
4:00 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break sponsored by Sun Life Financial		
4:30 p.m. - 6:00 p.m.	Concurrent Advanced Financial Planning Sessions (additional CE credits available)		
	<p>Dr. Carol Pomare, Ph.D, DBA Assistant Professor of Accounting - Mount Allison University Socially Responsible Investing</p> <p> Sable Ballroom</p>	<p>Anthony Williams, CFP®, RRC® Vice President of Academic Affairs - Canadian Institute of Financial Planning (CIFP) Intergenerational Wealth Transfers: Having the Conversation with Clients</p> <p style="text-align: right;"> Pending Approval Acadia Ballroom</p>	
7:00 p.m. – 9:00 p.m.	<p>Dinner after exploring the Canadian Museum of Immigration at Pier 21 sponsored by CIFP Retirement Institute</p> <p>5:30 p.m. - 7:30 p.m. • Buses loop to the venue from the conference hotel.</p> <p>7:30 p.m. - 10:00 p.m. • Buses loop from the venue back to the conference hotel.</p>		
			

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Tuesday, June 12, 2018








7:00 a.m.	Breakfast sponsored by Mackenzie Investments		<i>Exhibitor Area / Nova Scotia Ballroom</i>
7:30 a.m.	Dr. Meir Statman , B.A., M.B.A. <i>Glenn Klimek Professor of Finance, Leavey School of Business, Santa Clara University</i> Investors Across Cultures: Lessons from Behavioral Finance		<i>Nova Scotia Ballroom</i> 
8:30 a.m.	Frances Donald , B.A., M.A. <i>Senior Economist - Manulife Asset Management</i> North American Economic Update: Today's party is tomorrow's hangover		<i>Nova Scotia Ballroom</i> 
9:30 a.m.	Myles Zyblock , B.A. (Hons.), M.A., CFA <i>Chief Investment Strategist - 1832 Asset Management L.P. - Scotiabank</i> Navigating the Maturing Bull Market		<i>Nova Scotia Ballroom</i> 
10:30 a.m. – 11:15 a.m.	Exhibitor and Refreshment Break sponsored by TD Asset Management Inc.		<i>Exhibitor Area</i>
11:15 a.m.	Jackie Power , B.A. <i>Director, Tax and Estate Planning - Mackenzie Investments</i> Estate Planning for Blended Families		<i>Nova Scotia Ballroom</i> 
12:15 p.m. – 1:15 p.m.	Concurrent Education Sessions		
	Mariska Loeppky , CPA, CA, TEP, CFP® <i>Director, Tax and Estate Planning - Investors Group</i> Planning for U.S. taxpayers living in Canada and selected cross-border issues  <i>Sable Ballroom</i>	Julia Haggerty <i>Regional Manager - CWB Maxium Financial</i> How to maximize the value of your practice for future sale and What to look for when buying a Book of Business!  <i>Acadia Ballroom</i>	Michael White , CFA <i>Portfolio Manager, Multi-Asset Strategy - Picton Mahoney</i> Hedge: Survival May Depend On It – The Role of Authentic Hedge in Modern Portfolio Construction  <i>Annapolis Room</i>
1:15 p.m. – 2:30 p.m.	Lunch sponsored by Manulife Investments 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.)		<i>Exhibitor Area / Nova Scotia Ballroom</i> <i>Pending Approval</i>
2:30 p.m.	Cary List , CPA, CA, CFP® <i>President & CEO - Financial Planning Standards Council (FPSC)</i> The Value You Bring		<i>Nova Scotia Ballroom</i> 
3:00 p.m. – 4:00 p.m.	Concurrent Education Sessions		
	Steve Bang , B.A., M.B.A., CFP®, Fellow of FPSC <i>Professor of Business - Humber College</i> Credit and the Things They Never Tell You  <i>Sable Ballroom</i>	Bill Bell , B.Math, B.Ed, CHS, CFP®, CLU, CEA, CIM <i>Financial Advisor - Manulife Securities Incorporated</i> Jeff Spencer , CFP® <i>Vice President, Retail Sales - Manulife Bank</i> Is Debt and Cash Flow Derailing Financial Planning?  <i>Acadia Ballroom</i>	Robert Reid , APFS, ACII, CFP® <i>Director - Principal Syndaxi Chartered Financial Planners UK</i> "Up close at a distance" - Effective Remote Working  <i>Annapolis Room</i>
4:00 p.m. – 4:30 p.m.	Exhibitor and Refreshment Break sponsored by Financial Planning Standards Council		<i>Exhibitor Area</i>

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4:30 p.m. - 6:00 p.m.	Concurrent Advanced Financial Planning Sessions (additional CE credits available)	
	<p>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;">Tax Planning for Your Clients</p> <p style="text-align: center;">1.5  Sable Ballroom</p>	<p>Perry Truster, BSc, FCPA, FCA, TEP <i>Partner - Truster Zweig LLP</i></p> <p style="text-align: center;">Small Business Tax Changes</p> <p style="text-align: center;">1.5  Acadia Ballroom</p>
7:00 p.m. – 9:00 p.m.	<p>Dinner while enjoying the views of the Murphy's Cable Wharf Restaurant and the dockside Harbour Queen <i>sponsored by Scotiabank</i></p> <div style="text-align: right;">  </div>	

Wednesday, June 13, 2018

7:00 a.m.	<p>Breakfast sponsored by Franklin Templeton Investments Exhibitor Area / Nova Scotia Ballroom Closing Remarks: Keith Costello, <i>President & CEO - Canadian Institute of Financial Planners (CIFPs)</i></p>		
7:30 a.m.	<p>Greg Johnson Nova Scotia Ballroom <i>Storm-Chaser & Severe Weather Expert</i> From Chasing Sticky Ideas to Chasing Storms – Building Your Legacy</p>		
8:30 a.m.	<p>Ahmed Farooq Nova Scotia Ballroom <i>VP ETF Business Development - Franklin Templeton Investments</i> The Evolution of Index Investing </p>		
9:30 a.m.	<p>Exhibitor and Refreshment Break sponsored by White Glove Workshops Exhibitor Area</p>		
10:00 a.m. – 11:00 a.m.	Concurrent Education Sessions		
	<p style="text-align: center;">Frank Maselli <i>Best-Selling Author & Industry Expert - White Glove Workshops</i></p> <p style="text-align: center;">The Lifeguard in the Storm: A New WHY for a New World!</p> <p style="text-align: center;">Pending Approval Nova Scotia Ballroom</p>	<p style="text-align: center;">Ross Allan <i>Life Insurance Specialist: President - Allan Financial</i></p> <p style="text-align: center;">The Regeneration of the Life Insurance Industry</p> <p style="text-align: center;"> Sable Ballroom</p>	
	<p style="text-align: center;">Shawn Brayman <i>President - PlanPlus Inc.</i></p> <p style="text-align: center;">Latest Insights in Behavioural Finance and Investor Suitability</p> <p style="text-align: center;"> Acadia Ballroom</p>	<p style="text-align: center;">Dr. Amar Rahou, Ph.D, MSc, BSc <i>Professor, Bachelor of Commerce - Finance, The Business School, Humber Institute of Technology & Advanced Learning</i></p> <p style="text-align: center;">Retirement Planning for Different Generations</p> <p style="text-align: center;"> Annapolis Room</p>	
11:00 a.m. – 12:00 p.m.	Concurrent Education Sessions		
	<p style="text-align: center;">Nauvzer Babul <i>CEO - Smart Money Invest</i></p> <p style="text-align: center;">Creating Wealth ... in a Digital World</p> <p style="text-align: center;"> Sable Ballroom</p>	<p style="text-align: center;">Kevin Wark, LLB, CLU TEP <i>Managing Partner - Integrated Estate Solutions</i></p> <p style="text-align: center;">Corporate Owned Insurance - Boom or Bust?</p> <p style="text-align: center;"> Acadia Ballroom</p>	<p style="text-align: center;">Freddi Dogterom, CCDP, CPT, P.R.P., RRC® <i>Accredited Speaker - Freddi Speaks!</i></p> <p style="text-align: center;">Client Conversations with a Personality Advantage</p> <p style="text-align: center;"> Annapolis Room</p>
12:00 p.m.	<p>Conference Adjourns</p>		