



Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

CIFPs 17th Annual National Conference - 2019

Clear Sailing to Plan

The Westin Bayshore – Vancouver, British Columbia

Sunday June 2nd - Wednesday June 5th

Educational Streams Focusing On:

- Retirement and Lifestyle Planning

presented by the CIFP Retirement Institute

- Risk Management

- Advanced Financial Planning

(additional CE credits available)

Conference Agenda

Sunday, June 02, 2019







4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception <i>sponsored by IG Wealth Management</i>	Exhibitor Area
7:00 p.m. - 9:30 p.m.	Opening Dinner <i>sponsored by IG Wealth Management</i> Opening Dinner Speaker: Steve Patterson , Award-Winning Comedian & Humour Writer	Bayshore Grand Ballroom

Monday, June 03, 2019


7:00 a.m.	Breakfast <i>sponsored by CI Investments</i>		Exhibitor Area / Bayshore Grand Ballroom
	Opening Remarks: Jim Boylan , Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs) Evelyn Zohlen , FPA Board President		
7:30 a.m.	Michael Gregory , CFA Deputy Chief Economist and Head of U.S. Economics - BMO Capital Markets Economic Outlook: Bounce Back or Lasting Lethargy?		Bayshore Grand Ballroom 1 Approved CE FPA Canada
8:30 a.m.	Amol Sodhi , CFA, CIM Vice President & Director, Asset Allocation and Fund of Funds - TD Asset Management Inc. The Retirement Conundrum		Bayshore Grand Ballroom 1 Approved CE FPA Canada
9:30 a.m.	Bruno De Pace Director, Practice Management, Strategic Business Development - CI Investments Say It Ain't So: Countering Your Competitor's Claims		Bayshore Grand Ballroom 1 Approved CE FPA Canada
10:30 a.m. - 11:15 a.m.	Exhibitor and Refreshment Break <i>sponsored by BMO Global Asset Management</i>		Exhibitor Area
11:15 a.m.	Frances Donald , B.A., M.A. Head of Macroeconomic Strategy - Manulife Asset Management Global Economic Outlook: A Year of Volatility		Bayshore Grand Ballroom 1 Approved CE FPA Canada
12:15 p.m. - 1:15 p.m.	Concurrent Education Sessions		
	Sheryl Troup , CPA, CA, TEP, CFP® Director, Tax and Estate Planning - IG Wealth Management Setting Up for Succession 1 Approved CE FPA Canada Stanley Park Salon 1	Keith Leech , CFP®, CLU, CHFC, CHS Insurance Advisor and Consultant - Sponsored by Manulife Bank Brown Rainbows, Phone Chargers and Old School Agendas – How Top Performers Show Their Value 1 Approved CE FPA Canada Stanley Park Salon 2	Karen Tzupa , B.S.H.Ec.; CFP®, CEA Financial Planning Specialist Building a Case for "Just in Case" 1 Approved CE FPA Canada Stanley Park Salon 3

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1:15 p.m. - 2:00 p.m.	Lunch sponsored by Fidelity Investments Canada	Exhibitor Area / Bayshore Grand Ballroom	
2:00 p.m.	Peter Bowen, CPA, CA Vice-President, Tax and Retirement Research - Fidelity Investments Canada Retirement 2019: A Global Perspective	Bayshore Grand Ballroom 	
3:00 p.m. - 4:00 p.m.	Concurrent Education Sessions		
	Ross Allan Life Insurance Specialist: President - Allan Financial Disruptive Trends in the Life Insurance Industry  Stanley Park Salon 1	Thomas R. Barker Professor & Coordinator, Financial Services - Centennial College Current Trends and Issues in Financial Planning  Stanley Park Salon 2	Annie Stoneburgh Founder - 2 Steps Ahead Navigating the Longevity Journey – How to Stay “2 Steps Ahead”  Stanley Park Salon 3
	4:00 p.m. - 4:30 p.m. Exhibitor and Refreshment Break sponsored by TD Asset Management Inc. Exhibitor Area		
4:30 p.m. - 6:00 p.m.	CIFP Case Challenge - National Competition <i>This spring, teams representing colleges from across the country squared off in the annual CIFP Case Challenge Competition in two regional events hosted in Edmonton and Toronto. The Case Challenge is open to students enrolled in a financial services program at their academic institution.</i> <i>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.</i> <i>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 2019 CIFPs Case Challenge...and you, the Conference delegates in attendance, will play a role in choosing the winner (details to follow).</i> <i>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>		Bayshore Grand Ballroom 
	Western Regional Winners Red River College, Winnipeg, MB Shih-Chi (Desiree) Huang Trang (Suzie) Anh Nguyen Scott Lobban Coach: Maria Vincenten	Eastern Regional Winners George Brown College, Toronto, ON Erica Valentine Prema Chandran Wenxuan (Matthew) Liu Coach: Tracey Britt	
7:00 p.m. - 9:00 p.m.	Dinner while exploring the Vancouver Aquarium in Stanley Park sponsored by Scotiabank 6:15 p.m. - 7:45 p.m. • Buses loop to the venue from the conference hotel. 7:45 p.m. - 11:15 p.m. • Buses loop from the venue back to the conference hotel.		

Tuesday, June 04, 2019

7:00 a.m.	Breakfast sponsored by Desjardins PlanPlus Canada Financial Planning Awards Presentation	Exhibitor Area / Bayshore Grand Ballroom
7:30 a.m.	Niels Veldhuis President - The Fraser Institute Canada's Competitiveness Problem	Bayshore Grand Ballroom 
8:30 a.m.	Dennis Mitchell, BBA, MBA, CFA Chief Executive Officer and Chief Investment Officer - Starlight Capital The Case for Real Assets	Bayshore Grand Ballroom 

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9:30 a.m.	<p>The Raw Truth: The Tidal Wave of Woman in Wealth, RI, Bioscience and Guiding Client Behaviours Is Your Practice Ready <i>Fireside Chat sponsored by Desjardins</i></p> <p>Moderated by Michelle Hastick-Cowell, RRC® <i>Vice President of Wealth & Strategic Management - BKJFG</i></p> <p>Deborah Debas <i>Responsible Investment Specialist - Desjardins</i></p> <p>Dr. George Jackowski, Ph.D. <i>Transformative Factor in Bioscience Development</i></p> <p>Jad Chehlawi <i>Founder and CEO - Systelos</i></p> <p>Tuula Jalasjaa, MBA, CFA <i>Banking and Wealth Management Senior Executive</i></p>		<p>Bayshore Grand Ballroom</p> <p>1  Approved CE FFP Designer</p>
10:30 a.m.	<p>Pat Dunwoody <i>Executive Director - Canadian ETF Association (CETFA)</i></p> <p>Are ETFs the Future of Financial Services?</p>		<p>Bayshore Grand Ballroom</p>
10:40 a.m. - 11:15 a.m.	<p>Exhibitor and Refreshment Break sponsored by Starlight Capital</p>		<p>Exhibitor Area</p>
11:15 a.m.	<p>Tim Brisibe, TEP <i>Director, Tax and Estate Planning - Mackenzie Investments</i></p> <p>Passive Income</p>		<p>Bayshore Grand Ballroom</p> <p>1  Approved CE FFP Designer</p>
12:15 p.m.	<p>Angela Pecoraro <i>Chief Executive Officer - Advicent</i></p> <p>Embrace the Third Wave of Financial Planning</p>		<p>Bayshore Grand Ballroom</p> <p>1  Approved CE FFP Designer</p>
1:15 p.m. - 2:00 p.m.	<p>Lunch sponsored by Manulife Investments</p>		<p>Exhibitor Area / Bayshore Grand Ballroom</p>
2:00 p.m.	<p>Anthony Williams, CFP®, RRC® <i>President - Canadian Institute of Financial Planners (CIFPs)</i></p> <p>Ethical Conduct for CFP® Professionals</p>		<p>Bayshore Grand Ballroom</p> <p>1  Approved CE FFP Designer</p>
3:00 p.m. - 4:00 p.m.	<p>Concurrent Education Sessions</p>		
	<p>Mariska Loepky, B. Comm (Hons.), CPA, CA, TEP, CFP® <i>Director, Tax and Estate Planning - IG Wealth Management</i></p> <p>Tax Planning for Canadian Snowbirds</p> <p>1  Approved CE FFP Designer Stanley Park Salon 1</p>	<p>Karim Rashwan, CFP® <i>Director of Product Management - AdvisorStream Ltd.</i></p> <p>Digital Client Engagement - Understanding the Risks and Reaping the Rewards</p> <p>1  Approved CE FFP Designer Stanley Park Salon 2</p>	<p>Freddi Dogterom, CCDP, CPT, P.R.P., RRC® <i>Accredited Speaker - Freddi Speaks!</i></p> <p>Five Fabulous Fingertip Tools for High Touch Client Engagement</p> <p>1  Approved CE FFP Designer Stanley Park Salon 3</p>
4:00 p.m. - 4:30 p.m.	<p>Exhibitor and Refreshment Break sponsored by Mackenzie Investments</p>		<p>Exhibitor Area</p>
4:30 p.m. - 6:00 p.m.	<p>Concurrent Advanced Financial Planning Sessions (additional CE credits available)</p>		
	<p>Dr. Ian Lee, Ph.D. <i>Associate Professor - Spratt School of Business, Carleton University</i></p> <p>Is There a Canadian Pension Crisis? Are Canadians Saving Too Little?</p> <p>1.5  Approved CE FFP Designer Stanley Park Salon 1</p>	<p>Trevor R. Parry, M.A., LL.B., LL.M (Tax), TEP <i>President - TRP Strategy Group</i></p> <p>Tax Planning Today: Helping the 1% and Those Who Want to Be in It</p> <p>1.5  Approved CE FFP Designer Stanley Park Salon 2</p>	
6:30 p.m. - 8:30 p.m.	<p>Buffet Dinner at the H Restaurant and Pool Garden of the Bayshore Westin Hotel <i>sponsored by Advicent</i></p>		

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Wednesday, June 05, 2019

7:00 a.m.	Breakfast sponsored by Franklin Templeton Investments Closing Remarks: Keith Costello, CEO - Canadian Institute of Financial Planners (CIFPs)		Exhibitor Area / Bayshore Grand Ballroom
7:30 a.m.	Adam Kreek <i>Gold Medal Olympian & Executive Coach</i> Teamwork and Leadership in Times of Change		Bayshore Grand Ballroom 
8:30 a.m.	Jocelyn Duncan, CIM, CFP®, CPCA <i>Vice President Regional Sales, Vancouver Island & BC Interior - Franklin Templeton Investments</i> Understanding Hedge Funds		Bayshore Grand Ballroom 
9:30 a.m.	Exhibitor and Refreshment Break sponsored by The Globe and Mail		Exhibitor Area
10:00 a.m. - 11:00 a.m.	Concurrent Education Sessions		
	<p>Carolyn M. Fallis, MTax, CPA, CA, CFP®, FP Canada™ Fellow <i>Professor, School of Accounting and Finance - George Brown College</i> Smoke and Mirrors: Is the Canadian Middle Class Really Better Off?</p> <p> Bayshore Grand Ballroom</p>	<p>Curtis McCone <i>President of Wealth Management and Employee Benefits - HUB International Ontario</i> Financial Wellness in the Workplace</p> <p> Stanley Park Salon 1</p>	
	<p>Vivek Thomas President - Maximizer CRM Luke Aulin <i>CEO Aka "The Mayor" - RTOWN</i> Building Client Value Using Technology</p> <p> Stanley Park Salon 2</p>	<p>Yves Rebetez, CFA <i>Senior Executive Consultant - Credo Consulting</i> Identifying Opportunities in Canada's Shifting Advice Landscape</p> <p> Stanley Park Salon 3</p>	
11:00 a.m. - 12:00 p.m.	Concurrent Education Sessions		
	<p>Shawn Brayman <i>CEO - PlanPlus Global Inc.</i> From Tolerance to Solution: Latest Research and Practical Examples</p> <p> Stanley Park Salon 1</p>	<p>Partha Sen, MBA <i>Founder and Chief Executive Officer, FastIndex (Fuzzy Logix Inc. USA)</i> Designing Cross-Market Portfolios (Developed and Developing Economies) for Differentiated Returns</p> <p>Pending Approval Stanley Park Salon 2</p>	<p>Dr. Amar Rahou, Ph.D., MSc, BSc <i>Professor, Bachelor of Commerce - Finance, The Business School, Humber Institute of Technology & Advanced Learning</i> Financial and Non-financial Factors Affecting Retirement</p> <p> Stanley Park Salon 3</p>
12:00 p.m.	Conference Adjourns		