



*Building a strong profession today, for tomorrow*

The Canadian Institute of Financial Planners

## CIFPs 18<sup>th</sup> Annual National Conference - 2020

Monday, October 19<sup>th</sup> & Tuesday, October 20<sup>th</sup>

10:00 a.m. to 4:00 p.m. Eastern Daylight Time

### Virtual Event - Preliminary Agenda

*Subject to Change*

#### Monday, October 19, 2020

10:00 a.m.	<p><b>Opening Remarks:</b> <b>Dr. Paul Griffin</b>, CFP®, RRC® - <i>Humber College, School of Business</i>  <b>Jim Boylan</b>, CFP® - <i>Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)</i></p>
10:15 a.m.	<p><b>Politics In A Time of Plague</b>  <b>Rex Murphy</b>  <i>Social Commentator, Editorialist &amp; Distinct Canadian Voice</i></p>
11:00 a.m.	<p><b>Insights From Fidelity's Retirement Survey</b>  <b>Peter Bowen</b>, CPA, CA  <i>Vice-President, Tax and Retirement Research - Fidelity Investments Canada</i>  <b>Michelle Munro</b>  <i>Director, Tax and Retirement Research - Fidelity Investments Canada</i></p>
11:45 a.m.	<p><b>Sponsor Networking Break</b></p> <ul style="list-style-type: none"> <li>• Go to the "Networking" tab to be randomly paired with another participant; spend 3 minutes sharing ideas and getting to know each other</li> <li>• Go to the "Expo" tab and browse around our virtual sponsor area; check out our sponsor booths</li> </ul>
12:15 p.m.	<p><b>The US Federal Election: Market and Economic Impact</b>  <b>Fred Demers</b>, B.A., M.A.  <i>Director, Multi-Asset Solutions - BMO Global Asset Management</i>  <b>Richard Poulin</b>, CIM, FMA, FCSI  <i>Director, Intermediary Distribution - BMO Global Asset Management</i></p>
1:00 p.m.	<p><b>The Issues/Problems That Advisors Can Face When Dealing With Powers of Attorney</b>  <b>Athenea O'Bryan</b>  <i>Senior Manager, Tax and Estate Planning - IG Wealth Management</i></p>
1:45 p.m.	<p><b>Sponsor Networking Break</b></p> <ul style="list-style-type: none"> <li>• Go to the "Networking" tab to be randomly paired with another participant; spend 3 minutes sharing ideas and getting to know each other</li> <li>• Go to the "Expo" tab and browse around our virtual sponsor area; check out our sponsor booths</li> </ul>
2:10 p.m.	<p><b>Navigating the Economic Recovery Through COVID: A Three Phase Approach</b>  <b>Frances Donald</b>, B.A., M.A.  <i>Head of Macroeconomic Strategy - Manulife Asset Management</i>  <b>Barbara Foy-Pilchner</b>  <i>Managing Director, National Accounts - Manulife Asset Management</i></p>
2:55 p.m. - 3:55 p.m.	<p style="text-align: center;"><b>Advanced Financial Planning Sessions</b> (additional CE credits available)</p> <p><b>Navigating Your Clients Health Wealth Journey</b>  <b>Annie Stoneburgh</b>  <i>Founder - 2 Steps Ahead</i></p>
3:55 p.m.	<p><b>Day One, Closing Remarks &amp; Prize Announced from participation in the Sponsor Networking Breaks</b>  <b>Dr. Paul Griffin</b>, CFP®, RRC® - <i>Humber College, School of Business</i></p>

# CIFPs 18<sup>th</sup> Annual National Conference - 2020

**Tuesday, October 20, 2020**

10:00 a.m.	<b>Opening Remarks:</b> <b>Dr. Paul Griffin, CFP®, RRC®</b> - <i>Humber College, School of Business</i>
10:10 a.m.	<b>Sustainable Investing at TDAM</b> <b>Damian Fernandes, CFA</b> <i>Vice President &amp; Director - TD Asset Management Inc.</i>
10:55 a.m.	<b>Current Trends and Issues in Financial Planning</b> <b>Anthony Williams, CFP®, RRC®</b> <i>President - Canadian Institute of Financial Planners (CIFPs)</i>
11:40 a.m.	<b>Sponsor Networking Break</b> <ul style="list-style-type: none"> <li>• Go to the "Networking" tab to be randomly paired with another participant; spend 3 minutes sharing ideas and getting to know each other</li> <li>• Go to the "Expo" tab and browse around our virtual sponsor area; check out our sponsor booths</li> </ul>
12:10 p.m.	<b>Use Your Superpowers To Lead The Recovery</b> <b>Mike Lipkin</b> <i>President - Environics/Lipkin, a global research and motivation company</i> <b>Michelle Hastick-Cowell, RRC®</b> <i>Vice President, Wealth &amp; Strategic Management - BKJFG</i>
12:55 p.m.	<b>Building Resilient Retirement Income Portfolios</b> <b>Allan Seychuk, CFA</b> <i>Vice President and Senior Investment Director Alternatives Team - Mackenzie Investments</i>
1:40 p.m.	<b>Sponsor Networking Break</b> <ul style="list-style-type: none"> <li>• Go to the "Networking" tab to be randomly paired with another participant; spend 3 minutes sharing ideas and getting to know each other</li> <li>• Go to the "Expo" tab and browse around our virtual sponsor area; check out our sponsor booths</li> </ul>
2:05 p.m.	<b>Global Upheaval &amp; Fixed Income Markets</b> <b>John W. Beck</b> <i>Senior Vice President, Director of Fixed Income - Franklin Templeton Investments</i> <b>Ahmed Farooq, CFP®, CIMA®</b> <i>Vice President, ETF Business Development - Franklin Templeton Investments</i>
2:50 p.m. - 3:50 p.m.	<b>Advanced Financial Planning Sessions</b> (additional CE credits available)
	<b>Lifecycle Tax Planning for Business and Professional Corporations</b> <b>Trevor R. Parry, M.A., LL.B., LL.M (Tax), TEP</b> <i>President - TRP Strategy Group</i>
3:50 p.m.	<b>Day Two, Closing Remarks &amp; Prize Announced from participation in the Sponsor Networking Breaks</b> <b>Keith Costello, BADM, MBA-Strategy - CEO - Canadian Institute of Financial Planners (CIFPs)</b>

**Wednesday, October 21, 2020**

10:00 a.m. - 12:00 p.m.	<b>Ethical Conduct for CFP® Professionals</b> <b>Anthony Williams, CFP®, RRC®</b> <i>President - Canadian Institute of Financial Planners (CIFPs)</i>
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**Wednesday, November 25, 2020**

12:00 p.m. - 2:00 p.m.	<b>Ethical Conduct for CFP® Professionals</b> <b>Anthony Williams, CFP®, RRC®</b> <i>President - Canadian Institute of Financial Planners (CIFPs)</i>
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**Wednesday, December 09, 2020**

10:00 a.m. - 12:00 p.m.	<b>Ethical Conduct for CFP® Professionals</b> <b>Anthony Williams, CFP®, RRC®</b> <i>President - Canadian Institute of Financial Planners (CIFPs)</i>
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