



*Building a strong profession today, for tomorrow*

The Canadian Institute of Financial Planners

## CIFPs 19<sup>th</sup> Annual National Conference - 2021

Monday, November 22<sup>nd</sup> & Tuesday, November 23<sup>rd</sup>

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

### Virtual Event - Preliminary Agenda

*Subject to Change*

#### Monday, November 22, 2021

10:00 a.m.	<b>Conference Opening Remarks</b> <b>Dr. Paul Griffin</b> , CFP®, RRC® - Humber College, School of Business <b>Jim Boylan</b> , CFP® - Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)	
10:15 a.m.	<b>Connecting the Dots - Anticipating How Today's Events Will Shape Tomorrow's Realities</b> <b>Anna Maria Tremonti</b> <i>Journalist, Podcaster &amp; 17 Season Host of 'The Current'</i>	
11:00 a.m.	<b>2022: An Antiforecast</b> <b>Frances Donald</b> , B.A., M.A. <i>Managing Director, Global Chief Economist &amp; Global Head of the Macroeconomic Strategy - Manulife Investment Management</i>	
11:45 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>	
12:15 p.m.	<b>Prepare your Portfolios for 2022</b> <b>Sadiq Adatia</b> <i>Chief Investment Officer - BMO Global Asset Management</i> <b>Mike Scheiers</b> , MBA <i>Vice President, National Accounts - BMO Global Asset Management</i>	
1:00 p.m.	<b>Finding Opportunities with ETFs – A Practitioners Guide</b> <b>Nirujan Kanagasingam</b> , CFA <i>VP, ETF Strategy, CI Global Asset Management</i> <b>Stephen Lingard</b> , CFA <i>Senior Portfolio Manager, CI Global Asset Management</i> <b>Nick Griffin</b> <i>Founding Partner &amp; Chief Investment Officer at Munro Partners</i>	
1:45 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>	
2:10 p.m.	<b>Current Trends and Issues in Financial Planning</b> <b>Anthony Williams</b> , CFP®, RRC® <i>President - Canadian Institute of Financial Planners (CIFPs)</i>	
<b>Concurrent Sessions</b>		
2:55 p.m. - 3:55 p.m.	<b>How to Drive Revenue with Scroll-Stopping Digital</b> <b>Karim Rashawn</b> , CFP® <i>Managing Director - AdvisorStream</i>	<b>ETFs 101</b> <b>Pat Dunwoody</b> - Executive Director - CETFA <b>Erik Sloane</b> - Head of Sales - Neo Exchange
3:55 p.m.	<b>Day One, Closing Remarks &amp; Prize Announced from participation in the Sponsor Networking Breaks</b> <b>Dr. Paul Griffin</b> , CFP®, RRC® - Humber College, School of Business	

# CIFPs 19<sup>th</sup> Annual National Conference - 2021

Tuesday, November 23, 2021

10:00 a.m.	<b>Opening Remarks:</b> Dr. Paul Griffin, CFP®, RRC® - Humber College, School of Business
10:10 a.m.	<b>Environmental, Social, and Governance (ESG) Investing at TDAM</b> John McHughan ESG Director - TD Asset Management Inc.
10:55 a.m.	<b>The 'Great' Retirement?!</b> Peter Bowen, CPA, CA Vice-President, Tax and Retirement Research - Fidelity Investments Canada Michelle Munro Director, Tax and Retirement Research - Fidelity Investments Canada
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>Think Canadian Innovation ETFs</b> Lisa Lake Langley CEO & President - Emerge Canada
12:55 p.m.	<b>Maximizing After-Tax Equity Returns in Today's Market Environment</b> Katherine Owen, MBA, CFA Vice President, Portfolio Manager, Mackenzie Global Equity & Income Team - Mackenzie Investments Ome Saidi, MBA, CFA Vice President, Portfolio Manager, Mackenzie Global Equity & Income Team - Mackenzie Investments
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>Net-zero Is a Net-positive for Infrastructure Investors</b> Dave Wahl ClearBridge Investments Liz Bouthillier SVP, Sales - Franklin Templeton Investments Canada
2:50 p.m.	<b>Utilizing the CHIP Reverse Mortgage</b> Andrew Cairns National Lead, Wealth Management - HomeEquity Bank
3:50 p.m.	<b>Day Two, Closing Remarks &amp; Prize Announced from participation in the Sponsor Networking Breaks</b> Dr. Paul Griffin, CFP®, RRC® - Humber College, School of Business Keith Costello, BADM, MBA-Strategy - CEO - Canadian Institute of Financial Planners (CIFPs)

Wednesday, November 24, 2021

12:00 p.m. - 2:00 p.m.	<b>Ethical Conduct for CFP® Professionals</b> Anthony Williams, CFP®, RRC® President - Canadian Institute of Financial Planners (CIFPs)
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Thursday, December 02, 2021

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