



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

CIFPs 20th Annual National Conference - 2022

Sheraton Fallsview – Niagara Falls, Ontario

Monday September 5th - Thursday September 8th

Educational Streams Focusing On:

<ul style="list-style-type: none"> • Retirement and Lifestyle Planning <i>presented by the CIFP Retirement Institute</i>
<ul style="list-style-type: none"> • Risk Management
<ul style="list-style-type: none"> • Advanced Financial Planning

Conference Agenda

Subject to Change

Monday, September 05, 2022

4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception sponsored by Scotiabank	<i>Exhibitor Area</i>
7:00 p.m. – 9:30 p.m.	Opening Dinner sponsored by Scotiabank Opening Dinner Speaker: Dave Hemstad , triple threat in the comedy world as a stand-up, writer, and actor	<i>Great Room BC</i>

Tuesday, September 06, 2022

7:00 a.m.	Breakfast sponsored by BMO Global Asset Management Opening Remarks: Jim Boylan , Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)		<i>Exhibitor Area / Great Room BC</i>
7:30 a.m.	2022 – 2023 Economic and Financial Outlook: A Look at Major Post-COVID Trends, Effect of Politics, and Inflation Fred Demers <i>Director, Multi-Asset Solutions - BMO Global Asset Management</i>		
8:30 a.m.	The Current Market Environment Jose Alancherry , CFA <i>Vice President & Client Portfolio Manager - TD Asset Management Inc.</i>		
9:30 a.m.	Financial Services Title Protection in Ontario Huston Loke , CFA <i>Executive Vice President of Market Conduct - Financial Services Regulatory Authority of Ontario (FSRA)</i>		
10:00 a.m. – 11:00 a.m.	Exhibitor and Refreshment Break sponsored by TD Asset Management Inc.		<i>Exhibitor Area</i>
11:00 a.m.	2022 – the year of multiple surprises, where do we go from here? Macan Nia , CFA <i>Co-Chief Investment Strategist - Manulife Investments</i>		
12:00 p.m.	Ethical Conduct for Financial Planning Professionals - Part 1 Anthony Williams , RRC®, CFP® <i>President - Canadian Institute of Financial Planners (CIFPs)</i>		
1:00 p.m. – 2:00 p.m.	Lunch sponsored by Fidelity Investments Canada		<i>Exhibitor Area / Great Room BC</i>
2:00 p.m.	Inflation, Taxes and More - Fidelity's 5 Key Risks to Retirement Income Planning Peter Bowen , CPA, CA <i>Vice-President, Tax and Retirement Research - Fidelity Investments Canada</i>		
3:00 p.m. – 4:00 p.m.	Concurrent Education Sessions		
	Are You Part of all Your Clients' Big Financial Decisions? Joanne Martire <i>Regional Director, National Accounts - Manulife Bank</i> <p style="text-align: right;"><i>Great Room BC</i></p>	Guiding Affluent Clients on Giving While Living Brent Shaw <i>Director, Tax & Estate Planning - IG Wealth Management</i> <p style="text-align: right;"><i>Strategy Room 2+3</i></p>	

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4:00 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break sponsored by Franklin Templeton	Exhibitor Area
4:30 p.m. – 5:30 p.m.	The Human and Financial Costs of Long Term Care: Can We Ever Solve The Puzzle? Karen Henderson , Hon BA, CPCA <i>Founder and CEO - Long Term Care Planning Network</i>	
6:00 p.m. – 8:30 p.m.	Evening Dinner Event at Margaritaville sponsored by CIFP Retirement Institute	

Wednesday, September 07, 2022

7:00 a.m.	Breakfast sponsored by CI Global Asset Management		Exhibitor Area / Great Room BC
7:30 a.m.	Retire and Aspire - Building Client Loyalty Beyond the Numbers Scott Armstrong <i>CEO - Mind Switch Training Inc</i>		
8:30 a.m.	Investing When Policy Regimes Shift Matthew Strauss , CFA <i>SVP & Portfolio Manager, Global Equities - CI Global Asset Management</i>		
9:30 a.m.	Don't Underestimate the Power of a Balanced Portfolio Thomas D. Spicer , CFA <i>Managing Director and Portfolio Advisor - Wellington Management</i> <i>Sponsored by Vanguard</i>		
10:30 a.m. – 11:15 a.m.	Exhibitor and Refreshment Break sponsored by HomeEquity Bank		Exhibitor Area
11:15 a.m.	Navigating Volatile Markets with Infrastructure Investing David Wahl <i>Director, Senior Portfolio Specialist - Clearbridge Investments</i> <i>Sponsored by Franklin Templeton</i>		
12:15 p.m.	Ethical Conduct for Financial Planning Professionals - Part 2 Anthony Williams , RRC®, CFP® <i>President - Canadian Institute of Financial Planners (CIFPs)</i>		
1:15 p.m. – 2:00 p.m.	Lunch sponsored by Vanguard		Exhibitor Area / Great Room BC
2:00 p.m.	Reverse Mortgage Emergence in HNW Planning Steve Ranson , FCPA, FCA <i>President and CEO - HomeEquity Bank</i>		
3:00 p.m. – 4:00 p.m.	Concurrent Education Sessions		
	The World of Leveraged Life Insurance Trevor R. Parry , M.A., LL.B., LL.M (Tax), TEP <i>President - TRP Strategy Group</i> Great Room BC	5 Symptoms and Solutions to Common Investor Concerns Karim Rashwan , CFP® <i>Product Partnerships Director - Broadridge</i> Strategy Room 2+3	
4:00 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break sponsored by Advisor Stream		Exhibitor Area
4:30 p.m. - 6:00 p.m.	Concurrent Advanced Financial Planning Sessions (additional CE credits available)		
	The Road Ahead: Inflation, Interest Rates and Other Potential Challenges Patrick J. O'Meara , RRC®, CFP®, CMA, CPA, MBA <i>Professor, Niagara University</i> Great Room BC	Investment Risk Evaluation Knut Larsen , cand.oecon., CFP®, RRC® <i>Partner - Brigus Learning Inc.</i> Strategy Room 2+3	
6:30 p.m. – 8:30 p.m.	Evening Dinner Event at the Sheraton Fallsview Hotel <i>sponsored by IG Wealth Management</i>		Exhibitor Area / Fallsview Studio ABC

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Thursday, September 08, 2022

7:00 a.m.	Breakfast sponsored by Manulife Investments <i>Exhibitor Area / Great Room BC</i> Closing Remarks: Keith Costello, CEO - Canadian Institute of Financial Planners (CIFPs)	
7:30 a.m.	Challenge of Change – Finding Opportunity in Adversity Warren Macdonald <i>Motivational Speaker - Shifting Your Perception On Change</i>	
8:30 a.m.	Tax Strategies for Retirement Income Frank Di Pietro, CFA, CFP® <i>Assistant Vice President, Tax and Estate Planning - Mackenzie Investments</i>	
9:30 a.m.	Exhibitor and Refreshment Break sponsored by Mackenzie Investments <i>Exhibitor Area</i>	
10:00 a.m. – 11:00 a.m.	Concurrent Education Sessions	
	Back to Life: Navigating the Fall of Traditional Financial Planning Kevin O'Brien <i>Author - Financial Planet</i> <i>Great Room BC</i>	Family Business Coaching Insights Elaine Froese, CSP, CAFA <i>Certified H.I. Coach</i> <i>Strategy Room 2+3</i>
11:00 a.m.	Current Trends and Issues in Financial Planning Anthony Williams, RRC®, CFP® <i>President - Canadian Institute of Financial Planners (CIFPs)</i>	
12:00 p.m.	Conference Adjourns	