



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

## CIFPs 20<sup>th</sup> Annual National Conference - 2022

Sheraton Fallsview – Niagara Falls, Ontario

Monday September 5<sup>th</sup> - Thursday September 8<sup>th</sup>

### Educational Streams Focusing On:

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

### Preliminary Agenda - Subject to Change

#### Monday, September 05, 2022

4:30 p.m.	<b>Conference Registration &amp; Check-in</b>	
6:00 p.m.	<b>Cocktail Reception</b> sponsored by Scotiabank	<i>Exhibitor Area</i>
7:00 p.m. – 9:30 p.m.	<b>Opening Dinner</b> sponsored by Scotiabank <b>Opening Dinner Speaker: Dave Hemstad</b> , 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.	<b>Breakfast</b> sponsored by BMO Global Asset Management <b>Opening Remarks: Jim Boylan</b> , Chair of the Board of Directors - Canadian Institute of Financial Planners (CIFPs)	<i>Exhibitor Area / Great Room BC</i>
7:30 a.m.	<b>2022 – 2023 Economic and Financial Outlook: A Look at Major Post-COVID Trends, Effect of Politics, and Inflation</b> <b>Fred Demers</b> Director, Multi-Asset Solutions - BMO Global Asset Management	
8:30 a.m.	<b>The Current Market Environment</b> <b>Jose Alancherry</b> , CFA Vice President & Client Portfolio Manager - TD Asset Management Inc.	
9:30 a.m.	<b>Financial Services Title Protection in Ontario</b> <b>Huston Loke</b> , CFA Executive Vice President of Market Conduct - Financial Services Regulatory Authority of Ontario (FSRA)	
10:00 a.m. – 11:00 a.m.	<b>Exhibitor and Refreshment Break</b> sponsored by TD Asset Management Inc.	<i>Exhibitor Area</i>
11:00 a.m.	<b>2022 – the year of multiple surprises, where do we go from here?</b> <b>Macan Nia</b> , CFA Co-Chief Investment Strategist - Manulife Investments	
12:00 p.m.	<b>Ethical Conduct for Financial Planning Professionals - Part 1</b> <b>Anthony Williams</b> , RRC®, CFP® President - Canadian Institute of Financial Planners (CIFPs)	
1:00 p.m. – 2:00 p.m.	<b>Lunch</b> sponsored by Fidelity Investments Canada	<i>Exhibitor Area / Great Room BC</i>
2:00 p.m.	<b>Inflation, Taxes and More - Fidelity's 5 Key Risks to Retirement Income Planning</b> <b>Peter Bowen</b> , CPA, CA Vice-President, Tax and Retirement Research - Fidelity Investments Canada	
3:00 p.m. – 4:00 p.m.	<b>Concurrent Education Sessions</b>	
	<b>Are You Part of all Your Clients' Big Financial Decisions?</b> <b>Joanne Martire</b> Regional Director, National Accounts - Manulife Bank  <i>Great Room BC</i>	<b>Guiding Affluent Clients on Giving While Living</b> <b>Brent Shaw</b> Director, Tax & Estate Planning - IG Wealth Management  <i>Strategy Room 2+3</i>

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

### Wednesday, September 07, 2022

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

# CIFPs 20<sup>th</sup> Annual National Conference - 2022

Thursday, September 08, 2022

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