



Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

CIFPs 21st Annual National Conference – 2023

The Westin Ottawa – Ottawa, Ontario

Sunday, June 11th - Wednesday, June 14th

Conference Agenda

Subject to Change


Sunday, June 11, 2023

4:30 p.m.	Conference Registration & Check-in	
6:00 p.m.	Cocktail Reception sponsored by Scotiabank	Exhibitor Area
7:00 p.m. - 9:30 p.m.	Opening Dinner sponsored by Scotiabank Opening Dinner Speaker: Derek Seguin – Stand-up Comedian	Confederation I and II

Monday, June 12, 2023

7:00 a.m.	Breakfast sponsored by BMO Global Asset Management Opening Remarks: Chair of the Board of Directors – Canadian Institute of Financial Planners (CIFPs)	Confederation I and II / Exhibitor Area
7:30 a.m.	Lights, Camera, AI! Malcolm White Portfolio Manager, Global Technology – BMO Global Asset Management	Confederation I and II
8:30 a.m.	Is the 60/40 Portfolio Dead? Michael Greenberg Senior Vice President and Portfolio Manager – Franklin Templeton Investments	
9:30 a.m.	The Investment Case for Sustainable Infrastructure Peter Fox Senior Vice President – KBI Global Investors Sponsored by Sun Life Global Investments	
10:30 a.m. - 11:00 a.m.	Exhibitor and Refreshment Break sponsored by Franklin Templeton Investments	Exhibitor Area
11:00 a.m.	TBA Keynote Speaker Scotiabank	Confederation I and II
12:00 p.m.	Ethical Conduct for Financial Planning Professionals - Part 1 Anthony Williams, RRC®, CFP® President – Canadian Institute of Financial Planners (CIFPs)	
1:00 p.m. - 2:00 p.m.	Lunch sponsored by Fidelity Investments Canada Michael Salvatori, PhD, OCT Vice President Strategy – Niagara University Ontario	Confederation I and II / Exhibitor Area
2:00 p.m.	Reaching Retirement Goals Amidst Macroeconomic Headwinds: Fidelity's 2023 Retirement Survey Michelle Munro Director, Tax Planning – Fidelity Investments Canada	Confederation I and II

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3:00 p.m. - 4:00 p.m.	Concurrent Education Sessions		
	<p>Surprising Uses of the CHIP Reverse Mortgage in High-Net-Worth Financial Planning Jeff Thorsteinson – Vice President, Wealth Distribution Andrew Cairns – National Lead, Wealth Management Mike Martino – Business Development Manager HomeEquity Bank Wealth Team Governor General I</p>	<p>Sales, Stereotypes, and Seniors: Building Trust with your Mature Clients Amanda Richards Senior Director, Business Development and Community Integration – Chartwell Retirement Residences Governor General II</p>	<p>An Integral Element of Your Client's Future Plans Betty-Anne Howard, CFP®, MFA–P, CLU, CHS, CEA Philanthropic Financial Planner Award–Winning Speaker, Author, Financial Literacy Advocate, and Charitable Giving Expert Confederation I and II</p>
4:00 p.m. - 4:30 p.m.	<p>Exhibitor and Refreshment Break sponsored by HomeEquity Bank</p>		<p>Exhibitor Area</p>
4:30 p.m. - 5:30 p.m.	<p>Live Well, Age Well, Die Well Dr. Daren Heyland Professor of Medicine and Epidemiology – Queen's University</p>		<p>Confederation I and II</p>
6:00 p.m. - 9:00 p.m.	<p>Evening Dinner Event at the Lowertown Brewery and Sens House in the historic ByWard Market sponsored by IG Wealth Management</p> <p style="text-align: center;"><i>The venue is a short walk from the hotel in the ByWard Market and you may arrive between 6:00 p.m. and 7:30 p.m.</i></p>		

Tuesday, June 13, 2023

7:00 a.m.	<p>Breakfast sponsored by CI Global Asset Management</p>	<p>Confederation I and II / Exhibitor Area</p>
7:30 a.m.	<p>In the Spotlight: Fixed Income's Time to Shine Alexandra Gorewicz, CIM Vice President & Director – TD Asset Management</p>	<p>Confederation I and II</p>
8:30 a.m.	<p>How the NEW Tax-Free First Home Savings Account (FHSA) Can Help Clients Access the Housing Market Wilmot George Jr., CFP®, TEP, CLU, CHS Vice President, Tax, Retirement & Estate Planning – CI Global Asset Management</p>	
9:30 a.m.	<p>Quality, When You Need it Most Surenathan Tharumakulasingam, CFA® Senior Strategist – Vanguard Investments Canada Aimé Bwakira, CFA® Head of Product, Canada – Vanguard Investments Canada</p>	
10:30 a.m. - 11:15 a.m.	<p>Exhibitor and Refreshment Break sponsored by TD Asset Management Inc.</p>	<p>Exhibitor Area</p>
11:15 a.m.	<p>Are We Turning a Corner? Kevin Headland, CIM Co-Chief Investment Strategist – Manulife Investment Management</p>	<p>Confederation I and II</p>
12:15 p.m.	<p>Ethical Conduct for Financial Planning Professionals - Part 2 Anthony Williams, RRC®, CFP® President – Canadian Institute of Financial Planners (CIFPs)</p>	
1:15 p.m. - 2:00 p.m.	<p>Lunch sponsored by Vanguard</p>	<p>Confederation I and II / Exhibitor Area</p>
2:00 p.m.	<p>Current Trends and Issues in Financial Planning Anthony Williams, RRC®, CFP® President – Canadian Institute of Financial Planners (CIFPs)</p>	<p>Confederation I and II</p>

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3:00 p.m. - 4:00 p.m.	Concurrent Education Sessions		
	What's Holding Your Clients Back from Achieving Their Financial Goals? Bruno Amorim <i>Business Development Manager – Manulife Bank</i> Governor General I	Maximizing Career Wealth Darrell Jacobsen – Managing Partner Jonathan Ciliberto – Managing Director <i>Jacobsen Partners</i> Governor General II	Advance Serious Illness Planning: A Novel Way to Prepare People for Incapacity Dr. Daren Heyland <i>Professor of Medicine and Epidemiology – Queen's University</i> Confederation I and II
4:00 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break sponsored by Chartwell Retirement Residences Exhibitor Area		
4:30 p.m. - 6:00 p.m.	Concurrent Advanced Financial Planning Sessions (additional CE credits available)		
	MBA 101 for the Financial Planner: "Scarce" Human Resources in a World of Artificial Intelligence Patrick J. O'Meara, RRC®, CFP®, CMA, CPA, MBA <i>Professor – Niagara University</i> Governor General I	The Advanced Use of Life Insurance in a Punitive Tax Environment Trevor R. Parry, M.A., LL.B., LL.M (Tax), TEP <i>President - TRP Strategy Group</i> Governor General II	
6:30 p.m. - 8:30 p.m.	Evening Dinner Event at the Ottawa Westin Confederation I and II / Exhibitor Area <i>sponsored by CIFP Retirement Institute</i>		

Wednesday, June 14, 2023

7:00 a.m.	Breakfast sponsored by Manulife Investment Management Confederation I and II / Exhibitor Area Closing Remarks: Anthony Williams, President – Canadian Institute of Financial Planners (CIFPs)		
7:30 a.m.	Mandy Gill Confederation I and II <i>Athlete & Advocate for Healthy Habits</i>		
8:30 a.m.	Life Cycle Financial Planning for a Business Owner Craig McIntyre, MBA, CPA, CMA, CFP®, TEP <i>Director, Tax & Estate Planning – IG Wealth Management</i>		
9:30 a.m.	Exhibitor and Refreshment Break sponsored by Mackenzie Investments Exhibitor Area		
10:00 a.m.	TBA Keynote Speaker <i>Mackenzie Investments</i>		
11:00 a.m. - 12:00 a.m.	Concurrent Education Sessions		
	Secure Your Clients Savings with Gics: A Comprehensive Guide to Fixed Income Investments Christina Fazio, MBA <i>Director, Broker Deposits – HomeTrust</i> Governor General I	Human First – The Future of Financial Planning Gordon O. Stockman, BComm., CPA, CA, CFP, CIM <i>President – Nextgen Financial Planning & EWM Advisory LLC</i> Governor General II	Demonstrate Your Value Through Personalized Investment Planning Jenny MacMillan-Brown <i>Vice President, Business Development – Morningstar</i> Confederation I and II
12:00 p.m.	Conference Adjourns		