



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 to Wednesday, June 14th

Conference Agenda

Subject to Change


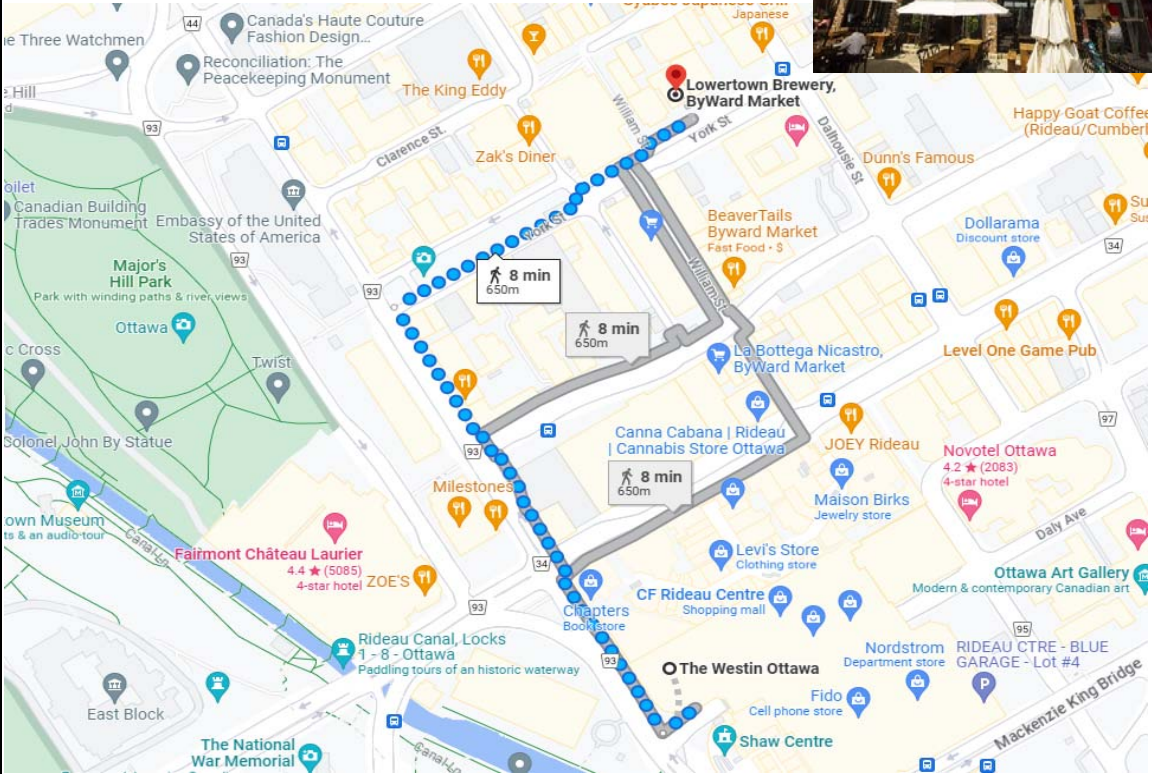
Sunday, June 11, 2023

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

Monday, June 12, 2023

7:00 a.m.	Breakfast sponsored by BMO Global Asset Management Opening Remarks: Peter G. Volpe , CFP®, FCSI – Chair of the Board of Directors – Canadian Institute of Financial Planners (CIFPs) Tony Mahabir , MBA, CMC, CIM, RRC®, RWM, CFP® – President – Convention of Independent Financial Advisors (CIFA)	<i>Confederation I and II / Exhibitor Area</i>
7:30 a.m.	Lights, Camera, All! Malcolm White , CFA® Portfolio Manager (Technology and Communications), Global Equity – BMO Global Asset Management	<i>Confederation I and II</i>
8:30 a.m.	Is the 60/40 Portfolio Dead? Michael Greenberg , CFA®, CAIA Senior Vice President and Portfolio Manager – Franklin Templeton Investments	
9:30 a.m.	The Investment Case for Sustainable Infrastructure Peter Fox , CFA® Senior Vice President, Business Development & Client Services – 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	<i>Exhibitor Area</i>
11:00 a.m.	Live Well, Age Well, Die Well Dr. Daren Heyland , MD, MSc, FRCPC Professor of Medicine and Epidemiology – Queen's University	<i>Confederation I and II</i>
12:00 p.m.	Ethical Conduct for Financial Planning Professionals - Part 1 Anthony Williams , RRC®, CFP® President and CEO – 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	<i>Confederation I and II / Exhibitor Area</i>
2:00 p.m.	Reaching Retirement Goals Amidst Macroeconomic Headwinds: Fidelity's 2023 Retirement Survey Michelle Munro Director, Tax Planning – Fidelity Investments Canada	<i>Confederation I and II</i>

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3:00 p.m. - 4:00 p.m.	Concurrent Education Sessions		
	<p style="text-align: center;">Inspiring Legacy: Your Client's Future Plans</p> <p style="text-align: center;">Betty-Anne Howard, CFP®, MFA–P, CLU, CHS, CEA</p> <p style="text-align: center;"><i>Philanthropic Financial Planner Award-Winning Speaker, Author, Financial Literacy Advocate, and Charitable Giving Expert</i></p> <p style="text-align: center;">Governor General I</p>	<p style="text-align: center;">Sales, Stereotypes, and Seniors: Building Trust with your Mature Clients</p> <p style="text-align: center;">Amanda Richards</p> <p style="text-align: center;"><i>Senior Director, Business Development and Community Integration – Chartwell Retirement Residences</i></p> <p style="text-align: center;">Governor General II</p>	<p style="text-align: center;">Surprising Uses of the CHIP Reverse Mortgage in High-Net-Worth Financial Planning</p> <p style="text-align: center;">Jeff Thorsteinson – Vice President, Wealth Distribution</p> <p style="text-align: center;">Andrew Cairns – National Lead, Wealth Management</p> <p style="text-align: center;">Mike Martino – Business Development Manager</p> <p style="text-align: center;"><i>HomeEquity Bank Wealth Team</i></p> <p style="text-align: center;">Confederation I and II</p>
4:00 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break sponsored by HomeEquity Bank Exhibitor Area		
	Advanced Financial Planning Sessions (additional CE credits available)		
4:30 p.m. - 6:00 p.m.	<p style="text-align: center;">MBA 101 for the Financial Planner: "Scarce" Human Resources in a World of Artificial Intelligence</p> <p style="text-align: center;">Patrick J. O'Meara, RRC®, CFP®, CMA, CPA, MBA</p> <p style="text-align: center;"><i>Professor – Niagara University</i></p>		Confederation I and II
6:30 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>		
			

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Tuesday, June 13, 2023

7:00 a.m.	Breakfast sponsored by CI Global Asset Management		<i>Confederation I and II / Exhibitor Area</i>
7:30 a.m.	In the Spotlight: Fixed Income's Time to Shine Alexandra Gorewicz, CIM <i>Vice President & Director – TD Asset Management</i>		<i>Confederation I and II</i>
8:30 a.m.	How the NEW Tax-Free First Home Savings Account (FHSA) Can Help Clients Access the Housing Market Wilmot George Jr., CFP®, TEP, CLU, CHS <i>Vice President, Tax, Retirement & Estate Planning – CI Global Asset Management</i>		
9:30 a.m.	Quality, When You Need it Most Surenathan Tharumakulasingam, CFA® <i>Senior Strategist – Vanguard Investments Canada</i> Aimé Bwakira, CFA® <i>Head of Product, Canada – Vanguard Investments Canada</i>		
10:30 a.m. - 11:15 a.m.	Exhibitor and Refreshment Break sponsored by TD Asset Management Inc.		<i>Exhibitor Area</i>
11:15 a.m.	Are We Turning a Corner? Kevin Headland, CIM <i>Co-Chief Investment Strategist – Manulife Investment Management</i>		<i>Confederation I and II</i>
12:15 p.m.	Ethical Conduct for Financial Planning Professionals - Part 2 Anthony Williams, RRC®, CFP® <i>President and CEO – Canadian Institute of Financial Planners (CIFPs)</i>		
1:15 p.m. - 2:00 p.m.	Lunch sponsored by Vanguard		<i>Confederation I and II / Exhibitor Area</i>
2:00 p.m.	Current Trends and Issues in Financial Planning Anthony Williams, RRC®, CFP® <i>President and CEO – Canadian Institute of Financial Planners (CIFPs)</i>		<i>Confederation I and II</i>
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> <i>Governor General I</i>	Maximizing Career Wealth Darrell Jacobsen – Managing Partner Jonathan Ciliberto – Managing Director <i>Jacobsen Partners</i> <i>Governor General II</i>	Advance Serious Illness Planning: A Novel Way to Prepare People for Incapacity Dr. Daren Heyland, MD, MSc, FRCPC <i>Professor of Medicine and Epidemiology – Queen's University</i> <i>Confederation I and II</i>
4:00 p.m. - 4:30 p.m.	Exhibitor and Refreshment Break sponsored by Chartwell Retirement Residences		<i>Exhibitor Area</i>
4:30 p.m. - 6:00 p.m.	Advanced Financial Planning Sessions (additional CE credits available)		
	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>		<i>Confederation I and II</i>
6:30 p.m. - 8:30 p.m.	Evening Dinner Event at the Ottawa Westin <i>sponsored by CIFP Retirement Institute</i>		<i>Confederation I and II / Exhibitor Area</i>

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Wednesday, June 14, 2023

7:00 a.m.	Breakfast sponsored by Manulife Investment Management <i>Confederation I and II / Exhibitor Area</i> Closing Remarks: Anthony Williams, President – Canadian Institute of Financial Planners (CIFPs)	
7:30 a.m.	Habits Are the Basis of Your Success <i>Confederation I and II</i> Mandy Gill <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 <i>Exhibitor Area</i>	
10:00 a.m.	2010s no more: Investing after Goldilocks Jules Boudreau <i>Senior Economist, Multi-Asset Strategies – Mackenzie Investments</i>	
11:00 a.m. - 12:00 p.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	