



Building a strong profession today, for tomorrow

The Canadian Institute of Financial Planners

# CIFPs 22<sup>nd</sup> Annual National Conference – 2024

Delta Hotels St. John's Conference Centre – NL

Sunday, April 28<sup>th</sup> to Wednesday, May 1<sup>st</sup>

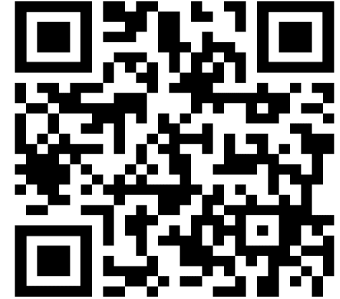
Conference Agenda

Subject to Change



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## Sunday, April 28, 2024

4:30 p.m.	<b>Conference Registration &amp; Check-in</b>	
6:00 p.m.	<b>Cocktail Reception</b> sponsored by <b>Scotiabank</b>	<i>Exhibitor Area</i>
7:00 p.m. - 9:30 p.m.	<b>Opening Dinner</b> sponsored by <b>Scotiabank</b>	<i>Avalon Ballroom</i>
8:30 p.m.	<b>Politically Speaking</b> <b>Althia Raj</b> <i>Political Journalist &amp; CBC "At Issue" Panelist</i>	

## Monday, April 29, 2024

7:00 a.m.	<b>Breakfast</b> sponsored by <b>BMO Global Asset Management</b> <b>Opening Remarks:</b> <b>Peter G. Volpe</b> , CFP®, FCSI – <i>Chair of the Board of Directors – Canadian Institute of Financial Planners (CIFPs)</i>	<i>Avalon Ballroom / Exhibitor Area</i>
7:30 a.m.	<b>Economic &amp; Market Outlook: Are we Still Underestimating the U.S. Economy?</b> <b>Fred Demers</b> <i>Director, Multi-Asset Solutions – BMO Global Asset Management</i>	<i>Avalon Ballroom</i>
8:30 a.m.	<b>Fixed Income: Where are we now and where are we going?</b> <b>Darcy Briggs</b> , CFA®, CPA, CGA, FRM <i>Senior Vice-President, Portfolio Manager - Franklin Templeton Fixed Income – Franklin Templeton Investments</i>	
9:30 a.m.	<b>Family Legacy Conversations - Becoming the Trusted Family Advisor</b> <b>Angelo Parziale</b> , CFP®, CIM, FEA <i>Director – Sun Life Consulting</i>	
10:30 a.m. - 11:00 a.m.	<b>Exhibitor and Refreshment Break</b> sponsored by <b>Franklin Templeton Investments</b>	<i>Exhibitor Area</i>
11:00 a.m.	<b>Agri-food Trends, Their Impact and Future Projections of Food Prices</b> <b>Dr. Sylvain Charlebois</b> <i>Professor of Food Distribution and Policy &amp; Senior Director of Agri-Food Analytics Lab – Dalhousie University</i>	<i>Avalon Ballroom</i>
12:00 p.m.	<b>Ethical Conduct for Financial Planning Professionals - Part 1</b> <b>Anthony Williams</b> , Chartered Financial Planner®, RRC®, CFP® <i>President and CEO – Canadian Institute of Financial Planners (CIFPs)</i>	
1:15 p.m. - 2:00 p.m.	<b>Lunch</b> sponsored by <b>Fidelity Investments Canada</b>	<i>Avalon Ballroom / Exhibitor Area</i>

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2:00 p.m.	<p><b>Perceptions of Retirement in Today's Uncertain Economic Landscape</b>  <b>Peter Bowen</b>  <i>Vice-President, Tax and Retirement Research – Fidelity Investments Canada</i></p> <p><b>Michelle Munro</b>  <i>Director, Tax and Retirement Research – Fidelity Investments Canada</i></p>	<b>Avalon Ballroom</b>
3:00 p.m.	<p><b>Retire and Aspire - Building Client Loyalty Beyond the Numbers</b>  <b>Scott Armstrong, BBA, BEd</b>  <i>Managing Director – Mind Switch</i></p>	
4:00 p.m. - 4:30 p.m.	<p><b>Exhibitor and Refreshment Break</b> sponsored by <b>Agri-Food Analytics Lab (AAL)</b></p>	<b>Exhibitor Area</b>
<p><b>Advanced Financial Planning Session</b> (additional CE credits available)</p>		
4:30 p.m. - 6:00 p.m.	<p><b>TFSA vs. RRSP – The Battle Continues!</b>  <b>Dr. R.J.T. (Jason) Engel, DBA, MBA, CPA, CMA, CFP®, MCBI, AICBI</b>  <i>Instructor – Red Deer Polytechnic Donald School of Business, Science, &amp; Computing</i></p>	<b>Avalon Ballroom</b>
6:30 p.m. - 9:00 p.m.	<p><b>Evening Dinner Event</b> at the <b>O'Reilly's Irish Newfoundland Pub</b>  on the legendary George Street sponsored by <b>IG Wealth Management</b></p> <p style="text-align: center;"><i>The venue is a short walk from the hotel to O'Reilly's and  you may arrive between 6:00 p.m. and 7:30 p.m.</i></p>	
		

**Tuesday, April 30, 2024**

7:00 a.m.	<p><b>Breakfast</b> sponsored by <b>Sun Life Global Investments</b></p>	<b>Avalon Ballroom / Exhibitor Area</b>
7:30 a.m.	<p><b>Home Ownership in Canada: Has the Dream Died?</b>  <b>Dr. Ian Lee, Ph.D.</b>  <i>Associate Professor – Sprott School of Business, Carleton University</i></p>	
8:30 a.m.	<p><b>Introduction to CPP Investments: The \$590.8B Powerhouse Behind the Canada Pension Plan</b>  <b>Jeffrey Hodgeson</b>  <i>Managing Director, Global Stakeholder Affairs – CPP Investments</i></p> <p><b>Katie Zajner, MBA</b>  <i>Manager, Stakeholder Affairs – CPP Investments</i></p>	

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9:30 a.m.	<b>Through the Looking Glass: Finding Diversification in a World of Distortions and Distractions</b> <b>Bryan Lee, CFA®</b> <i>Vice President &amp; Director, Retail Client Portfolio Management Team – TD Asset Management Inc.</i>	
10:30 a.m. - 11:15 a.m.	<b>Exhibitor and Refreshment Break</b> sponsored by <b>Advisor Hunt</b>	<i>Exhibitor Area</i>
11:15 a.m.	<b>Optimal Practice Succession™</b> <b>Darrell Jacobsen</b> <i>President – Advisor Hunt</i> <b>Johnathan Ciliberto</b> <i>Vice-President – Advisor Hunt</i>	<i>Avalon Ballroom</i>
12:15 p.m.	<b>Prosperitas Cum Caritate - Doing Well By Doing Good</b> <b>Michael Lee-Chin</b> <i>Entrepreneur and Philanthropist</i>	
1:00 p.m. - 2:00 p.m.	<b>Lunch</b> sponsored by <b>TD Asset Management</b>	<i>Avalon Ballroom / Exhibitor Area</i>
1:15 p.m.	<b>Ethical Conduct for Financial Planning Professionals - Part 2</b> <b>Anthony Williams</b> , Chartered Financial Planner®, RRC®, CFP® <i>President and CEO – Canadian Institute of Financial Planners (CIFPs)</i>	
2:00 p.m.	<b>An Ethical Review of the Growing use of GLP-1 Drugs for Weight Loss</b> <b>Dr. Kerry Bowman, Ph.D.</b> <i>Professor, Bioethicist and Environmentalist – University of Toronto</i>	<i>Avalon Ballroom</i>
3:00 p.m.	<b>All Things Nuclear - The Paradigm Shift in Cancer Treatment and Power Generation</b> <b>Dr. Hubert Walinski, Ph.D.</b> <i>Chief Scientific Officer – Life Sciences</i>	<i>Avalon Ballroom</i>
4:00 p.m. - 4:30 p.m.	<b>Exhibitor and Refreshment Break</b> sponsored by <b>Marsh Canada</b>	<i>Exhibitor Area</i>
4:30 p.m. - 6:00 p.m.	<b>Advanced Financial Planning Session</b> (additional CE credits available)	
4:30 p.m. - 6:00 p.m.	<b>Current Trends and Issues in Financial Planning</b> <b>Knut Larsen</b> , Chartered Financial Planner®, RRC®, CFP® <i>Senior Instructor – Canadian Institute of Financial Planning (CIFP)</i>	<i>Avalon Ballroom</i>
6:30 p.m. - 8:30 p.m.	<b>Evening Dinner Event</b> at the <b>Delta St. John's</b> <i>sponsored by CIFP Retirement Institute</i>	<i>Avalon Ballroom / Exhibitor Area</i>

### Wednesday, May 01, 2024

7:00 a.m.	<b>Breakfast</b> sponsored by <b>Mackenzie Investments</b> <b>Closing Remarks: Anthony Williams</b> , President and CEO – Canadian Institute of Financial Planners (CIFPs)	<i>Avalon Ballroom / Exhibitor Area</i>
7:30 a.m.	<b>Work Inspired</b> <b>Bill Carr</b> <i>Award Winning Comedian and Motivationalist</i>	<i>Avalon Ballroom</i>
8:30 a.m.	<b>Inter-Generational Business Transfers – Where are We Now?</b> <b>Sheryl Troup</b> , CPA, CA, TEP, CFP®, CLU® <i>Assistant Vice-President, Tax &amp; Estate Planning, Advanced Financial Planning – IG Wealth Management</i>	
9:30 a.m. - 10:00 a.m.	<b>Exhibitor and Refreshment Break</b> sponsored by <b>Equiton Partners</b>	<i>Exhibitor Area</i>
10:00 a.m.	<b>Managing Volatility with Fixed Income</b> <b>Frank Clyke</b> <i>Investment Director, Fixed Income – Mackenzie Investments</i>	
11:00 a.m.	<b>The Boom Within the Boom - Baby Boomers and Precision Oncology</b> <b>Dragos Berbecel</b> , MBA, CFA® <i>Portfolio Manager – Portland Investment Counsel</i>	
12:00 p.m.	<b>Conference Adjourns</b>	