



RETIREMENT CANADA DIALOGUE 2019

TORONTO
April 11th, 2019
Hotel X Toronto

Conference Agenda

Thursday, April 11, 2019

8:00 a.m.	Registration / Breakfast / Networking sponsored by Manulife Securities		Princes' Gates Ballroom & Foyer
8:45 a.m.	Opening Remarks: Carol Chow , Chair - CIFP Retirement Institute Pat Bolland , Business Media Guru		Hotel X Cinema
9:00 a.m.	Dr. Ian Lee , PhD. Associate Professor, <i>Spratt School of Business - Carleton University</i> Reforming Canada's Retirement Savings System - Solutions for a Non-Existent Problem?		Hotel X Cinema
9:45 a.m.	Richard Poulin , CIM, FMA, FCSI Director, <i>Regional Sales - BMO Global Asset Management</i> Reframing Retirement: Enhancing conversations with clients about their future		Hotel X Cinema
10:30 a.m.	Networking Break sponsored by Raintree Financial Solutions Inc.		Princes' Gates Foyer
10:50 a.m.	John Natale , LL.B., B.Comm. EPC, CFP® Assistant Vice President - Tax, Retirement & Estate Planning Services, Wealth - Manulife Securities The Bottom Line on Retirement Income		Hotel X Cinema
11:35 a.m.	Don Ezra Graduated from full-time work Longevity Insurance		Hotel X Cinema
12:20 p.m.	Concurrent Education Sessions		
	<p>Matt Simpson, MBA, CIM® VP of Ontario Region - Raintree Financial Solutions Inc. Alternative Fixed Income: Why Canada's Top Managers are Relying on Alternative Products to Generate Retirement Income Hotel X Cinema</p>	<p>Freddi Dogterom, CCDP, CPT, P.R.P., RRC® Accredited Speaker - <i>Freddi Speaks!</i> Client Conversations with a Personality Advantage Humber Park</p>	
1:05 p.m.	Lunch / Networking sponsored by BMO Global Asset Management		Princes' Gates Ballroom & Foyer
1:45 p.m.	Karen Henderson , Hon. BA, CPCA Founder/CEO - Long Term Care Planning Network Aging Well In Today's World: How Advisors Can Help Their Clients Make It Happen		Hotel X Cinema
2:30 p.m.	Chet Brothers , CFP® Brothers & Company Financial Understanding Investor Behaviour		Hotel X Cinema
3:15 p.m.	Networking Break sponsored by CIFP Retirement Institute		Princes' Gates Foyer
3:35 p.m.	Carolyn M. Fallis , MTax, CPA, CA, CFP®, Fellow of FPSC Professor, <i>School of Accounting and Finance - George Brown College</i> Tax Planning for Your Clients		Hotel X Cinema
4:20 p.m.	Closing Remarks: Pat Bolland , Business Media Guru		Hotel X Cinema
4:30 p.m.	Concurrent Education Sessions		
	<p>Aslan Mirkalami Transformational High-Performance Coach, Award Winning Author, and Speaker - <i>Result Doctor</i> How Work Identity Impacts Retirement Happiness Hotel X Cinema</p>	<p>Dr. Amar Rahou, PhD., MSc, BSc. Professor in Finance Degree - <i>The Business School, Humber Institute of Technology and Advanced Learning</i> Retirement Planning for Different Generations Humber Park</p>	
5:15 p.m.	Networking Reception sponsored by Manulife Securities		Princes' Gates Foyer
7:30 p.m.	Conference Adjourns		