



# RETIREMENT CANADA DIALOGUE 2021

November 16<sup>th</sup>, 2021  
Virtual Event

## Virtual Event - Preliminary Agenda

*Subject to Change*

Tuesday, November 16, 2021

9:45 a.m.	<b>Opening Remarks: Retirement Canada Dialogue 2021</b> <b>Tony Mahabir</b> , MBA, CMC, CIM, RRC®, CFP® <i>Chair - The Canadian Institute of Financial Planning</i> <b>Carol Chow</b> , RRC®, CFP® <i>Chair - CIFP Retirement Institute</i>
10:00 a.m.	<b>Connecting the Dots - Anticipating How Today's Events Will Shape Tomorrow's Realities</b> <b>Anna Maria Tremonti</b> <i>Journalist, Podcaster &amp; 17 Season Host of 'The Current'</i>
10:45 a.m.	<b>Trends in Retirement</b> <b>David Cravit</b> <i>Chief Membership Officer - Canadian Association of Retired Persons (C.A.R.P.)</i>
11:30 a.m.	<b>Sponsor Networking Break</b> <ul style="list-style-type: none"><li>• Go to the "Networking" tab to be randomly paired with another participant; spend 3 minutes sharing ideas and getting to know each other</li><li>• Go to the "Expo" tab and browse around our virtual sponsor area; check out our sponsor booths</li></ul>
11:50 a.m.	<b>Retirement Planning Strategies using Segregated Funds</b> <b>Rose Nguyen</b> , BA, CFP®, CIM <i>Senior Business Development Manager, Segregated Funds (Western Canada), BMO Insurance</i> <b>Ryan Armstrong</b> , CIM <i>Vice-President, Greater Vancouver, BMO Global Asset Management</i>
12:35 p.m.	<b>Your Retirement Prescription – It takes More than Money</b> <b>Freddi Dogterom</b> , BHHS, CCDP, P.R.P., RRC® <i>"Retired to the Life she designed"</i>
1:20 p.m.	<b>Sponsor Networking Break</b> <ul style="list-style-type: none"><li>• Go to the "Networking" tab to be randomly paired with another participant; spend 3 minutes sharing ideas and getting to know each other</li><li>• Go to the "Expo" tab and browse around our virtual sponsor area; check out our sponsor booths</li></ul>
1:35 p.m.	<b>The Times Are Changing: The Future for Financial Advisors</b> <b>Nadine Livingston</b> <i>Founding Member - Strategicy</i>
2:20 p.m.	<b>Understanding the Canada Pension Plan</b> <b>Doug Runchey</b> <i>Founder - DR Pensions Consulting</i> <i>Sponsored by Manulife Securities</i>
3:00 p.m.	<b>Sponsor Networking Break</b> <ul style="list-style-type: none"><li>• Go to the "Networking" tab to be randomly paired with another participant; spend 3 minutes sharing ideas and getting to know each other</li><li>• Go to the "Expo" tab and browse around our virtual sponsor area; check out our sponsor booths</li></ul>
3:15 p.m.	<b>Retire &amp; Aspire: the Mind Switch Model</b> <b>Scott Armstrong</b> <i>Founder - The Mind Switch Academy</i>
4:00 p.m.	<b>The Retirement Conundrum</b> <b>Jimmy Xu</b> , CFA <i>Vice President &amp; Senior Portfolio Manager - TD Asset Management Inc.</i>
4:45 p.m.	<b>Closing Remarks &amp; Prize Announced from participation in the Sponsor Networking Breaks</b> <b>Tony Mahabir</b> , MBA, CMC, CIM, RRC®, CFP® <i>Chair - The Canadian Institute of Financial Planning</i>
5:00 p.m.	Conference Adjourns