INSTITUTE OF ADVANCED FINANCIAL PLANNERS

EXPERIENCE | EXCELLENCE | EMPOWERMENT

20TH ANNUAL IAFP SYMPOSIUM AGENDA

THE HILTON LAC-LEAMY

SEPTEMBER 28TH TO OCTOBER 1, 2022

Wednesday, September 28th – Advanced Education Day – Beethoven

7:00 am – 6:30 pm	***Registration Desk – Registration and Delegate Packages***
7:00 – 7:50	**Breakfast and Registration**
7:55 – 8:00	Opening Remarks – Kathy McMillan, R.F.P.
8:00 – 8:40	**Bond Market Outlook: Past Performance is not Indicative of Future Results** A lookback at what happened, what to expect going forward. Hadiza Djataou - Mackenzie
8:45 – 9:45	**Institutional Investor Perspectives on Digital Assets** Join Giles as he discusses recent trends and research on digital currencies and the surprising evolution of institutional investor sentiment in North America. – Giles Anderson, Fidelity
9:45 – 10:00	**Refreshment break**
10:05 – 10:45	**The Power of Dividends** –Many investors are looking for a way to turn their investments into income. Today with the rate of rising inflation, this is no small task. Income Portfolios are made possible through a dedicated approach focused on dividend growth; the Power of Dividends is real! Sheila Wilson-Kowal - Cardinal
10:50 – 11:30	**The New 60/40 Portfolio** –The 60/40 portfolio did what it was supposed to do. It delivered decent returns with lower than market drawdowns. "What has worked will continue to work" a behavioral misstep known as recency bias. Alex Steele – Avenue Living
11:30 – 12:10	**Lunch**
12:15 – 12:50	**The Robinson Report: Private Lending; Are All MIC's Created Equal?** Join us for "***The Robinson Report***" - Gord Ross, Chief Sales Officer and his co-anchors discuss the history, benefits, risks, and differences associated with Mortgage Investment Corporations (MIC's). Gord Ross - W.A. Robinson
12:55 – 1:55	**Clean Energy ETF: where macro forces meet changing investor values -** Companies, governments, and ordinary investors are recognizing the need to shift away from fossil fuels. Climate change, energy geopolitics, and the improving business case for renewables have combined into a compelling argument for clean energy investing. – Mike Dragosits - Harvest Portfolios Group
1:55 – 2:05	**Mini Yoga Session:** the session will include some breathing techniques to help reduce stress, some simple seated stretches to reduce tension through the neck and shoulders as well as some yoga postures to increase your energy and get your body moving throughout the day. - Tayler Sawchuck
2:05 – 2:45	**How Planners Can Benefit from Quarterbacking Fiduciary Administration** The world's largest ever transfer of wealth is now underway, with an estimated $68 Trillion expected to change hands over the next couple of decades. - Ari Brojde - Estateably
2:45 – 3:05	**Refreshment break & Sponsor showcase –**
3:10 – 3:50	**The Bigger Picture – Planning for Financial Wellness Up & Down the Wealth-Complexity Curve** Although advisors want to be their clients' trusted advisor, the industry struggles to make comprehensive wealth planning accessible and efficient. In this session, James will discuss the shift towards financial wellness and the opportunity this presents for the industry. James Fraser, Planworth
3:55 – 4:35	**Using IPPs to Increase Retirement Wealth for Business Owners** Westcoast Actuaries steps into the ring with the Tyson family to see how an Individual Pension Plan (IPP) can bolster their retirement plan and provide significant tax reduction opportunities. – Bruce Moir – Spenser McCaig – Stephen Cheng – Westcoast Actuaries
4:40 – 5:00	***Wrap up***
6:30 – 9:30	***Welcome Reception – Foyer***

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Thursday, September 29th - Beethoven

7:00 - 8:00	***Breakfast and Registration***
8:00 – 8:05	**Delegates Welcome –** Terry Ritchie, R.F.P.
8:05 – 8:15	**Introduce the Case –** Meet the Maguire-Tyson family
8:15 – 9:15	**BDC Economic Outlook: What to expect? –** Join Pierre for an overview of the economic situation here and abroad. Pierre Cléroux, Business Development Bank of Canada
9:20 – 10:20	**The Ethical Financial Implications of Elder Abuse -** Statistics tell us that seven out of ten incidents of elder abuse are never reported to anyone. When it is reported the damage is done and it is too late to find a remedy. Know the world of the older person and your key role as financial planners to start the conversation for aging without Elder Abuse. - Sabby Duthie, former Retirement homeowner & John Johnson, Retirement Lawyer
10:20 – 10:35	**Refreshment Break & Sponsor Showcase** **Mozart**
10:40 – 10:50	**Silver and Bronze Recognition –** Kathy McMillan**,** R.F.P.
10:50 – 11:00	**President's update** and Membership update - Pam Magyar, R.F.P.
11:05 – 12:05	**When housing cannibalizes the economy: Why Canada's over-reliance on real estate sets up for a challenging future -** Housing is in crisis in Canada. House prices and consumer debt levels have run out of control. The current boom will eventually end, and when it does, how bad could it get and what sort of fallout might we expect to the broader economy? Ben Rabidoux, Founder & President, North Cove Advisors and Founder of Edge Analytics
12:05 – 12:15	**Mini Yoga Session:** the session will include some breathing techniques to help reduce stress, some simple seated stretches to reduce tension through the neck and shoulders as well as some yoga postures to increase your energy and get your body moving throughout the day. - Tayler Sawchuck
12:15 – 12:25	**TULIPMANIA REVISITED – PART ONE** In the 1630s, the prices of tulip bulbs got way out of hand in Holland – we talked about this at the 2018 Symposium. This year, we revisit the Tulipmania as a backdrop for an emergent financial planning issue faced by all clients: inflation. – BCV - Alec MacIsaac & Michelle Smith
12:25 – 1:25	***Lunch – Speed Dating***
1:30 – 1:40	***Announcement – 2023 Location & Venue*** *Aaron Hector*
1:45 – 2:00	**Platinum and Gold Recognition –** Kathy McMillan, R.F.P.
2:05 – 3:05	**Breakout Session: The Growth of U.S. Private Debt Funds – Current and Future Trends** Michael and Jeremy will examine the reasons for increased demand from institutional and retail investors for private debt/credit funds – Steepe & Co. - Michael Steepe & Jeremy Bach **Beethoven**
2:05 – 3:05	**Breakout Session: Technology Solutions for the Trusted Advisors** – James will highlight how technology can help you elevate to and maintain the role of trusted advisor to your clients - James Fraser – Planworth **Krieghoff**
2:05 – 3:05	**Breakout Session: Destress Your Clients and Your Business: The Case for Target Date Funds –** Target Funds are the solution to helping your clients and growing your business at the same time. Myron Genyk, Evermore Capital **Morrice**
3:05 – 3:25	***Refreshment Break & Sponsor Showcase*** ***Mozart***
3:30 – 4:30	**The next 20 years.** How the industry has evolved since the founding of the IAFP and the global trends that are pointing to where it will likely go in the future. Jason Pereira, R.F.P.
4:30 - 5:30	**Business Succession Planning, painful, we all know! And how to maximize income and minimize CRA** –The challenges of business succession, and how to draw cash flow from various sources in a tax-efficient manner. Peter Bowen, Fidelity Investments Canada ULC
630	**DINE ABOUT**

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Friday, September 30th – Beethoven

7:00 – 8:00	***Breakfast - Mozart***
8:00 – 8:10	**Opening Remarks –** Terry Ritchie, R.F.P.
8:15 – 9:15	**Personal Branding for Financial Planners** –In this foundational communication skills workshop, participants will learn how to effectively introduce themselves, 3 ways to engage clients, and how to optimize their body language. – Andrea Wojnicki, Chief Talker & Communication Coach
9:20– 10:20	**Re-Balance your Balanced Portfolio**— Reconsidering the 60/40 amid Inflation, Rising Rates, Volatility - After decades of rock-bottom interest rates and low yields from fixed income, investors following the standard 60/40 allocation balance were punished in early 2022 by unsteady equity markets, rapidly dropping bond prices, and yields that, despite rising, still stayed below the rate of inflation. - David Wysocki, Harvest Portfolios
10::20 - 10:40	***Refreshment Break & Sponsor Showcase - Mozart***
10:45 – 11:45	**Understanding the Canada Pension Plan** Everything your wanted to know about CPP and probably a whole lot more - Doug Runchey
11:50 – 12:00	**TULIPMANIA REVISITED – PART TWO -** In the 1630s, the prices of tulip bulbs got way out of hand in Holland – we talked about this at the 2018 Symposium. This year, we revisit the Tulipmania as a backdrop for an emergent financial planning issue faced by all clients: inflation. – BCV - Alec MacIsaac & Michelle Smith
12:00 - 1:20	**Lunch Speed Dating**
1:20 – 1:30	**Mini Yoga Session:** the session will include some breathing techniques to help reduce stress, some simple seated stretches to reduce tension through the neck and shoulders as well as some yoga postures to increase your energy and get your body moving throughout the day. - Tayler Sawchuck
1:30 – 1:35	Welcome the New R.F.P.'s
1:40 - 2:40	**Multifactor Asset Pricing: Theory and Practice** – When portfolios are evaluated through the multifactor lens it is much more difficult to find evidence of skilled managers – most managers are simply delivering noisy (and expensive) exposure to priced factors. – Benjamin Felix
2:40 – 3:00	***Refreshment Break & Sponsor Showcase***
3:05 – 4:05	**Online Wills: An Estate Lawyer's Perspective** In this session, you will learn about how online Wills work, which clients they may be right (and not right) for, and what to look for before recommending an online estate planning solution. **–** Arin Klug **Beethoven**
	Property & Casualty Insurance, Paul will be covering the general insurance needs from a property and casualty standpoint to properly cover the assets for the case study. - Paul Martin, President & COO **Krieghoff Room**
	Optimizing your LinkedIn, LinkedIn is so much more than a job searching tool! In this hands-on session, participants will learn how to update their LinkedIn profile in real-time, plus learn tips and common mistakes for networking online. Andrea Wojnicki, Chief Talker & Communication Coach **Morrice**
4:10 – 5:10	**Round Table Group Discussion – Case Study -** Symposium delegates take what they have learned and work together to solve some of the challenges presented by the Maguire-Tyson family.
6:30 – midnight	**Gala: Cocktails** – 6:30 – 7:30 – **Dinner** – 7:30 – 8:30 – **Live Band/Dance** – 8:30 - midnight

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Saturday, October 1st - Beethoven	
8:00 – 9:00	***Breakfast***
9:00 – 9:15	**Opening Remarks**
9:15 – 10:15	**Selected Cross Border Financial, Tax & Estate Planning Issues** Cross Boarder Update including: A Planning Framework, Immigration, Custom Planning, Investment Management & Banking, Income Tax Issues, Independence & Retirement, Estate Planning and Special Circumstances. - Terry Ritchie
10:15 – 10:30	***Refreshment Break***
10:30 – 11:30	**Financial Planning – The Standard for The Future Is Here Today – Warnings and Tips from A Lawyer Who Sues People Like Us -** Harold has represented over 1200 clients in claims against financial advisors and planners. In this session he will share his "lessons learned" with both real-life examples and issues arising from this year's case study. Better to hear from Harold in our session than to sit across the table when in a lawsuit's cross-examination! – Harold Geller
11:30 – noon	**Closing Remarks**

CE Categories:

1. Client Counseling
2. Estate Planning
3. Tax Planning
4. Insurance Planning
5. Ethics
6. FP Fundamentals
7. Interpersonal Skill Enhancement
8. Practice Management
9. Retirement Planning and Employee Benefits
10. Other