



INSTITUTE OF
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FINANCIAL
PLANNERS

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20TH ANNUAL IAFF 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 – 8:00	Breakfast and Registration
	Opening Remarks – Kathy McMillan, R.F.P.
8:00 – 8:40	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! <i>Sheila Wilson - Cardinal</i>
10:50 – 11:30	Title coming soon – Alex Steele and Yavor Nikov, Avenue Living
11:30 – 12:10	Lunch
12:15 – 12:50	TBA
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
2:00 – 2:40	Title Coming Soon - Estateably
2:40 – 3:00	Refreshment break & Sponsor showcase –
3:05 – 4:05	Coming Soon!
4:10 – 4:50	Coming Soon!
4:55 – 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	
8:15 – 9:15	Students	Practice Management
9:15 – 9:35	Refreshment Break & Sponsor Showcase - Mozart	
9:40 – 10:40	Elder Abuse & Transition to Assisted Living and Retirement Housing Sabby Duthie, former Retirement homeowner & John Johnson, Retirement Lawyer	
10:45 – 10:50	Silver and Bronze Recognition – Kathy McMillan, R.F.P.	
10:55 – 11:05	President’s update and Membership update - Pam Magyar, R.F.P.	
11:10 – 12:10	When housing cannibalizes the economy: Why Canada's over-reliance on real estate sets up for a challenging future Ben Rabidoux, Founder & President, North Cove Advisors and Founder of Edge Analytics	
12:15 – 12:25	Presentation Title to come – BCV - Alec & Michelle	
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	TBA – Coming Soon!	
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 IAFF and the global trends that are pointing to where it will likely go in the future. <i>Jason Pereira, R.F.P.</i>	
4:30 - 5:30	Title Coming Soon – Peter Bowen	
Evening	Free Time	
6:30	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 – Andrea Wojnicki, Chief Talker & Communication Coach, Talk about Talk	
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	Presentation title to come - BCV – Alec & Michelle	
12:00 - 1:20	Lunch Speed Dating	
1:25 – 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	Property & Casualty Insurance , Paul Martin, President & COO, KRJinsure Krieghoff Room	Insurance
	Optimizing your LinkedIn , Andrea Wojnicki, Chief Talker & Communication Coach, Talk about Talk Beethoven	
	Online Wills: An Estate Lawyer's Perspective – Arin Klug Morrice Room	
4:10 – 5:10	TBA – Coming Soon!	



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20TH ANNUAL IAFP SYMPOSIUM AGENDA

THE HILTON LAC-LEAMY
SEPTEMBER 28TH TO OCTOBER 1, 2022

6:30 – midnight	Gala: Cocktails – 6:30 – 7:30 Dinner – 7:30 – 8:30 Dance – 8:30 – midnight – Live Band	
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Saturday, September 29th - East Ballroom

8:00 – 9:00	Breakfast - West/Midway Ballroom	
9:00 – 9:15	Opening Remarks	
9:15 – 10:15	WRAP UP ROUND TABLE Details coming soon!	Practice Management
10:15 – 10:30	Refreshment Break - West/Midway Ballroom	
10:30 – 11:30	ROUND TABLE – Details coming soon!	Practice Management
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



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