

## 20<sup>TH</sup> ANNUAL IAFF SYMPOSIUM AGENDA

THE HILTON LAC-LEAMY  
SEPTEMBER 28<sup>TH</sup> TO OCTOBER 1, 2022

### Wednesday, September 28<sup>th</sup> – Advanced Education Day – Beethoven

7:00 am – 6:30 pm	<b>Registration Desk – Registration and Delegate Packages</b>
7:00 – 7:50	<b>Breakfast and Registration</b>
7:55 – 8:00	Opening Remarks – Kathy McMillan, R.F.P.
8:00 – 8:40	Mackenzie
8:45 – 9:45	<b>Institutional Investor Perspectives on Digital Assets</b> 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	<b>Refreshment break</b>
10:05 – 10:45	<b>The Power of Dividends</b> – 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	<b>The New 60/40 Portfolio</b> – Alex Steel & Yavor Nikov – Avenue Living 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.
11:30 – 12:10	<b>Lunch</b>
12:15 – 12:50	<b>The Robinson Report: Private Lending; Are All MIC’s Created Equal?</b> Join us for “ <i>The Robinson Report</i> ” - 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	<b>Clean Energy ETF: where macro forces meet changing investor values -</b> 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	<b>How Planners Can Benefit from Quaterbacking Fiduciary Administration</b> 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 - Estabeably
2:40 – 2:45	<b>Mini Yoga Session:</b> 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
2:45 – 3:00	<b>Refreshment break &amp; Sponsor showcase –</b>
3:10 – 3:50	<b>Title coming soon! – Planworth</b>
4:10 – 4:50	<b>Using IPPS to Increase Retirement Wealth for Business Owners</b> 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.
4:55 – 5:00	<b>Wrap up</b>
6:30 – 9:30	<b>Welcome Reception – Foyer</b>

## 20<sup>TH</sup> ANNUAL IAFP SYMPOSIUM AGENDA

THE HILTON LAC-LEAMY  
SEPTEMBER 28<sup>TH</sup> TO OCTOBER 1, 2022

### Thursday, September 29<sup>th</sup> - Beethoven

7:00 - 8:00	<b>Breakfast and Registration</b>	
8:00 – 8:05	<b>Delegates Welcome – Terry Ritchie, R.F.P.</b>	
8:05 – 8:15	<b>Introduce the Case</b>	
8:15 – 9:15	<b>TBA – Coming soon!</b>	<b>Practice Management</b>
9:15 – 9:35	<b>Refreshment Break &amp; Sponsor Showcase - Mozart</b>	
9:40 – 10:40	<b>Elder Abuse &amp; Transition to Assisted Living and Retirement Housing</b> Sabby Duthie, former Retirement homeowner & John Johnson, Retirement Lawyer	
10:45 – 10:50	<b>Silver and Bronze Recognition – Kathy McMillan, R.F.P.</b>	
10:55 – 11:05	<b>President’s update and Membership update - Pam Magyar, R.F.P.</b>	
11:10 – 12:10	<b>When housing cannibalizes the economy: Why Canada's over-reliance on real estate sets up for a challenging future</b> 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	<b>Lunch – Speed Dating</b>	
1:30 – 1:40	<b>Announcement – 2023 Location &amp; Venue</b> Aaron Hector	
1:45 – 2:00	<b>Platinum and Gold Recognition – Kathy McMillan, R.F.P.</b>	
2:10 – 2:50	<b>Breakout session – TBA</b>	
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3:05 – 3:25	<b>Refreshment Break &amp; Sponsor Showcase - Mozart</b>	
3:30 – 4:30	<b>The next 20 years.</b> 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. <i>Jason Pereira, R.F.P.</i>	
4:30 - 5:30	<b>Moving to Retirement –</b> The challenges of business succession, and how to draw cash flow from various sources in a tax-efficient manner. Peter Bowen	
Evening	<b>Free Time</b>	
6:30	<b>Dine About</b>	

## 20<sup>TH</sup> ANNUAL IAFP SYMPOSIUM AGENDA

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SEPTEMBER 28<sup>TH</sup> TO OCTOBER 1, 2022

### Friday, September 30<sup>th</sup> – Beethoven

7:00 – 8:00	<b>Breakfast - Mozart</b>	
8:00 – 8:10	<b>Opening Remarks</b> – Terry Ritchie, R.F.P.	
8:15 – 9:15	<b>Personal Branding for Financial Planners</b> – Andrea Wojnicki, Chief Talker & Communication Coach, Talk about Talk	
9:20– 10:20	<b>Re-Balance your Balanced Portfolio</b> — Reconsidering the 60/40 amid Inflation, Rising Rates, Volatility David Wysocki, Harvest Portfolios	
10::20 - 10:40	<b>Refreshment Break &amp; Sponsor Showcase - Mozart</b>	
10:45 – 11:45	<b>Understanding the Canada Pension Plan</b> 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	<b>Lunch Speed Dating</b>	
1:25 – 1:35	<b>Welcome the New R.F.P.'s</b>	
1:40 - 2:40	<b>Multifactor Asset Pricing: Theory and Practice</b> – 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	<b>Refreshment Break &amp; Sponsor Showcase</b>	
3:05 – 4:05	<b>Property &amp; Casualty Insurance,</b> Paul Martin, President & COO, KRJinsure <b>Krieghoff Room</b>	<b>Insurance</b>
	<b>Optimizing your LinkedIn,</b> Andrea Wojnicki, Chief Talker & Communication Coach, Talk about Talk <b>Beethoven</b>	
	<b>Online Wills: An Estate Lawyer's Perspective</b> – Arin Klug <b>Morrice Room</b>	
4:10 – 5:10	<b>TBA – Coming Soon!</b>	
6:30 – midnight	<b>Gala:</b> Cocktails – 6:30 – 7:30 Dinner – 7:30 – 8:30 Dance – 8:30 – midnight – Live Band	



INSTITUTE OF  
ADVANCED  
FINANCIAL  
PLANNERS

EXPERIENCE | EXCELLENCE | EMPOWERMENT 

## 20<sup>TH</sup> ANNUAL IAFP SYMPOSIUM

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#### Saturday, October 1<sup>st</sup> - Beethoven

8:00 – 9:00	<b>Breakfast</b>	
9:00 – 9:15	<b>Opening Remarks</b>	
9:15 – 10:15	Cross Border Update – Terry Ritchie	<b>Practice Management</b>
10:15 – 10:30	<b>Refreshment Break</b>	
10:30 – 11:30	ROUND TABLE WRAP UP – Details coming soon!	<b>Practice Management</b>
11:30 – noon	<b>Closing Remarks</b>	

#### 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