Breakout Session Selection

Please select the breakout session you plan on attending.

Wednesday, September 24th, at 3:25 – 4:05

☐ 1. **The Fellowship of Finance: Structuring Your Path to Maximize Financing and Business Value**
Tom de Larzac, Care Lending Group, Director - Advisory Finance

In this presentation, we will explore the critical aspects of business valuation and debt structuring as key drivers for growth with a specific consideration for Financial Advisors. We will begin by discussing the importance of accurate business valuation, highlighting the methodologies used to assess a company's worth and the factors that influence valuation outcomes. Next, we will delve into debt structuring, examining various financing options and strategies to optimize capital structure. Additionally, we will cover the benefits and risks associated with these structures, and how to align financing choices with business goals to support sustainable growth and proper succession planning. By the end of this presentation, you will have a more comprehensive understanding of how to leverage can aid in long term success. Join us on this journey to master the art of financial structuring and unlock your company's full potential.

☐ 2. **The Wizards of OZ: Lending in the Shadows of Mount Mortgage**
Denis Rudenko, Oz Capital, National Sales Director and, **Oleg Shiller**, Oz Capital, Co-Founder & Broker

In Middle-Earth, it wasn't just swords and spells that built empires—it was strategy, foresight, and the courage to navigate uncertain terrain. In this breakout session, Denis Rudenko and Oleg Shiller—The Wizards of OZ—reveal how they apply those same qualities to the world of private mortgage lending. Using real-world examples from their own underwriting adventures, they'll explore what it takes to build a resilient, high-quality mortgage portfolio amid shifting landscapes. From spotting risks lurking in the shadows to seizing opportunities hiding in plain sight, this session will equip you with tools, tales, and a touch of magic to better guide your clients on their financial quests.

☐ 3. **Clarity & Balance in your Investment Portfolios – Traditional / Alternatives**

James Dungate, Leith Wheeler Investment Counsel Ltd., CFA, Principal – Investment Funds
Matt Kidwell, CFA - Leith Wheeler Investment Counsel, Portfolio Manager

In today's volatile market environment, your role as a trusted advisor has never been more important. Join Leith Wheeler Investment Counsel for a timely and practical session on building resilient, disciplined portfolios designed to weather all stages of the market cycle.
Founded in Vancouver in 1982, Leith Wheeler is one of Canada's leading independent, employee-owned investment firms, managing over $31 billion in assets on behalf of pension plans, foundations, First Nations, advisors, and private clients.
Discover practical strategies to help clients navigate volatility through clear investment plans that incorporate financial planning, true diversification and the pros and cons of alternative investments. Learn why staying invested beats market timing and how to shift client focus from chasing performance to disciplined, goal-based investing. This session will equip you with insights, market updates and tools to strengthen your client relationships.

Breakout Session Selection

Please select the breakout session you plan on attending.

Friday, September 26th at 4:05 – 4:45

☐ 1. **Private Mortgage Funds Deconstructed: The Good, the Bad and the Ugly 2.0**
Michael Steepe, Steepe & Co., Founder.

This presentation will compare and contrast various mortgage fund offerings from Canada and the United States. It will examine the structural and regulatory differences between these markets while highlighting key investor risks - including conflicts of interest, embedded fees, and a lack of transparency - that are frequently associated with private mortgage funds.

☐ 2. **Ask the Experts: NOW Advisory Model in Action**
Michael van Lierop, New Outlook Wealth, President & Founder

Join us for a panel discussion with leading NOW advisors, including founders and recent additions to the team, who live and breathe the wealth management model that has literally transformed their advisory practice and business. Explore the dramatic changes to compliance, practice management, operations, marketing, and especially client experience as advisors escape the "old ways" of doing business in financial services in Canada.

☐ 3. **Sound Investments, Real Profits**
Kevin Geiger, ICM Group

Immune to market noise and resilient to inflation, the ICM Crescendo Music Royalty Fund provides investors a unique opportunity to participate in a traditionally inaccessible asset class. Music royalties deliver consistent income and the potential for long-term capital appreciation that is uncorrelated to public markets—an investment in perfect harmony with today's portfolio needs.