



THURSDAY, SEPTEMBER 13th

7:15 – 8:00	CONFERENCE REGISTRATION AND BREAKFAST <i>Sponsored by: Home Trust</i>
8:00 – 8:05	OFFICIAL WELCOME <i>Justin Warren, General Manager, Radius Financial Education</i>
8:05 – 8:10	OPENING REMARKS <i>Pat Bolland, Former BNN Anchor, Media Consultant</i>
8:10 – 9:00	KEYNOTE PRESENTATION: CHINA CREDIT CRISIS IMPACT ON THE GLOBAL ECONOMY & E.U. UPDATES <i>Lawrence McDonald, Managing Director, Head of Global Macro Strategy, ACGA and Creator of The Bear Traps Report</i> Global credit and currency risk are rising at the fastest pace in at least three years, where's the best risk-reward in global markets?
9:00 – 9:40	PANEL: FAMILY OFFICE & PRIVATE WEALTH <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</i> <i>Adam Buzanis, Director of Research, Prime Quadrant</i> <i>Michael Nairne, President & Chief Investment Officer, Tacita Capital Inc.</i> <i>Neil Nisker, Co-Founder and Executive Chairman, Our Family Office Inc.</i> <ul style="list-style-type: none"> • New challenges in designing, setting up, and running a family office. • Investment strategies, asset protection and tax efficient portfolio construction. • Aligning expectations and strategies across the family and office. • Addressing day-to-day operational challenges of running a family office. • Sourcing talent, developing family and non-family staff, hiring & firing key family execs. • Technology platforms for optimizing family offices, • Offshore Investing and regulatory
9:40 – 10:20	LIQUID ALTERNATIVES: DISRUPTIVE CHANGE IN THE CANADIAN MARKET <i>Nelson Arruda, Vice President, Portfolio Manager, Mackenzie Asset Allocation Team</i> The Canadian alternative investment market is on the edge of significantly changing with new proposed regulatory amendments. Similar to the Alternative markets in Europe and the US, should the proposed Canadian regulatory changes be adopted it will introduce a framework for offering a greater selection to retail investors.
10:20 – 10:40	NETWORKING BREAK <i>Sponsored by: SGGG Fund Services Inc.</i>

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10:40 – 11:40	<p>FUND MANAGER SHOWCASE <i>Facilitator: Robert Gignac, Author: Rich is a State of Mind</i> Traditional fund managers are looking to alternative strategies as more of a mainstream opportunity for their investors. Hear directly from fund managers discussing their products, theories and strategies. <i>Moderated by:</i></p> <ul style="list-style-type: none"> • Arrow Capital – Ahson Mirza, Portfolio Manager, Arrow Capital Management • Coin Capital – Lewis Bateman, Chief Business Officer, Coinsquare • Indigoblue Capital Corporation – Harry Singh, CEO, Indigoblue Capital Corporation • Lawrence Park Asset Management – Conner Sura, Director Business Development, Lawrence Park Asset Management • Northern Coast Financial – Thomas Jones, President, Northern Coast Financial • OKR Financial – Dr. Jason Neale, Partner, OKR Financial • Red Jacket Capital – Ken McCord, CEO, Portfolio Manager, Red Jacket Capital Inc. • Rivemont – Martin Lalonde, Founder, President and Portfolio Manager, Rivemont
11:40 – 12:20	<p>PANEL: REAL ESTATE AND REIT SECTOR OUTLOOK AND DEAL FLOW <i>Moderated by: Rob Stitt, V.P., Head of Institutional Sales, Fundamental Research Corp.</i> Matthew Barnes, Director of Sales, Centurion Asset Management Inc. Devon Cranson, Founder and President, Cranson Capital Securities Jason Jogia, CIO, Avenue Living Asset Management & CEO, Avenue Living Real Estate Opportunity Trust Nick Kyprianou, President & CEO, RiverRock Mortgage Investment Corporation</p> <ul style="list-style-type: none"> • Type of properties and outlook for those properties • Returns and fees • Structure / use of leverage / debt to equity • Valuation of properties • Pro and cons of continuous disclosure (public vs. private)
12:20 – 1:30	<p>BUFFET LUNCH <i>Sponsored by: CIFP</i></p>
12:35 – 1:20	<p>WHAT YOUR CLIENT SAID (WHILE YOU WEREN'T LISTENING...) <i>Robert Gignac, Author: Rich is a State of Mind</i></p> <p>Communication is at the core of every successful client/advisor relationship - and lack of communication (or improperly structured communication...) is one of the leading causes of client/advisor dissatisfaction and eventual breakup.</p> <p>Robert will offer concrete examples of what clients are struggling with today and how you can start to bridge the communication gap with your most valuable asset. Robert's 20 years of experience as a client of the Canadian financial services industry and regular conversations with clients just like yours from coast to coast provide the background for this session. Their concerns might surprise you, they might even scare you, but they will certainly enlighten you.</p> <p>Get ready to communicate - because if you're not willing to listen, prepare to watch your clients seek out someone who will.</p>

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1:30 – 2:10	<p>PANEL: AFTER A RECORD -BREAKING GROWTH WHAT'S NEXT FOR CANADA'S ETF INDUSTRY AND ITS IMPACT ON ALTERNATIVE INVESTMENTS <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant Bobby Eng, CIMA, Vice President & Head of SPDR ETFs Canada Daniel Straus, Ph.D., M.Fin., ETF Research & Strategy, Derivatives & Structured Products, National Bank Financial Joacim Wiklander, Chief Business Officer, Aequitas NEO Exchange</i></p> <p>This session will focus on the ETF landscape in Canada providing an update, review asset growth by category, analyze ETF flow and comparison to mutual fund flow and look at recent product launches, industry trends and new entrants in this growing ETF space. The session will also look at steps the regulators are taking in this growing ETF space. What's next for ETFs in terms of adoption at a distributor level, new product development and cross pollination with existing products and platforms and its impact on the Alternative Investment industry.</p>
2:10 – 3:00	<p>FUND MANAGER SHOWCASE <i>Facilitator: Robert Gignac, Author: <i>Rich is a State of Mind</i></i></p> <p>Traditional fund managers are looking to alternative strategies as more of a mainstream opportunity for their investors. Hear directly from fund managers discussing their products, theories and strategies.</p> <ul style="list-style-type: none"> • Avenue Living Asset Management – Jason Jogia, CIO, Avenue Living Asset Management & CEO, Avenue Living Real Estate Opportunity Trust • Axcess Capital – Peter Jarman, Partner, VP Capital Markets, Axcess Capital Advisor • Centurion Asset Management Inc. – Andrew Branch, Associate Director of Sales, Centurion Asset Management Inc. • Cranson Capital – Devon Cranson, Founder and President, Cranson Capital Securities • First Block Capital – Sean Clark, Founder & CEO, First Block Capital Inc. • Ninepoint Partners – Nick Kyprianou President & CEO, RiverRock Mortgage Investment Corporation • Prestige Capital – Curtis Potyondi, President, Prestige Capital Inc. • RISE Properties Trust – Leslie Toth, Vice President of Sales and Marketing, RISE Properties Trust
3:00 – 3:20	<p>NETWORKING BREAK <i>Sponsored by: State Street Global Advisors</i></p>
3:20 - 4:00	<p>PANEL: FUND STRUCTURING IN BERMUDA FOR CANADIAN FUND MANAGERS <i>Moderated by: Sean Moran, Interim CEO, Bermuda Business Development Agency Michael Burns, Co-Chair, Investment Funds and Asset Management Group, McMillan LLP Jennifer Eve, Counsel, Appleby (Bermuda) Limited Rod White, CEO, Krypton Fund Services Holdings Ltd.</i></p> <p>Bermuda is a centre of excellence for the formation and servicing of a wide variety of investment funds. This panel focuses on Bermuda's unique asset management offering, and its advantages for managers and investors.</p>

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	STREAM 1 –	STREAM 2 –
4:00 – 4:40	<p>PANEL: DIRECT LENDING, MICS AND THE NON-BANK LENDING SPACE <i>Moderated by: Rob Stitt, V.P., Head of Institutional Sales, Fundamental Research Corp.</i> Cam Goodnough, CEO, Timbercreek Financial Will Granleese, Director & Portfolio Manager, Antrim Investments Doug Saxon, Venture Partner, OKR Financial Harry Singh, CEO, Indigoblue Capital Corporation</p> <ul style="list-style-type: none"> • Type of borrower and outlook for that segment • Returns and fees • Rate outlook and impact on portfolio • Management of liquidity, use of leverage • Marketing strategy and securities registrations 	<p>IDENTIFY AND MANAGE THE CYBER SECURITY RISKS IN THIS NEW TECHNOLOGY AGE <i>Facilitator: Robert Gignac, Author: Rich is a State of Mind</i> Richard Austin, Partner, Deeth Williams Wall Elliott Behar, Founder, Inscape Privacy & Security, and former Security Counsel for Apple, Inc.</p> <p>This session focuses on how to think about, prepare for, and respond to, cybersecurity attacks and data breaches, and how to get out ahead of the potential tsunami of publicity and post-breach responsibilities that can ensue.</p> <p>Elliott Behar, a Toronto-based Security and Privacy Lawyer who previously worked as Security Counsel for Apple, Inc. will examine the issues that companies face in preparing for cyber attacks, handling potentially explosive incidents, and maintaining effective control, to ensure that the issue continues to be the breach, and does not become how the company has responded to it.</p> <p>Richard Austin, a partner at Deeth Williams Wall with over 30 years of experience in the area of information technology law, will discuss data breach notification responsibilities in light of the imminent coming into force of the breach notification provisions of the Digital Privacy Act, 2015.</p>
4:40 - 5:20	<p>PANEL: MILLENNIALS: THE NEXT WAVE OF IMPACT INVESTORS <i>Moderated by: Leanna Haakons, President, Black Hawk Financial</i> Jordan Blain, Vice President, Sales, Evolve ETFs Shane Dubin, Sr. Vice President, Wealth Advisor & Portfolio Manager, Canaccord Genuity Wealth Management Michelle Hung, Founder, Sassy Investor Jamie Wise, President & CEO, Periscope Capital</p>	<p>STREAM 2 –</p> <p>UPDATE ON PROPOSED CHANGES TO THE INVESTMENT AND REGULATORY FRAMEWORK FOR ALTERNATIVE INVESTMENTS <i>Facilitator: Robert Gignac, Author: Rich is a State of Mind</i> Ronald Kosonic, Partner, Borden Ladner Gervais LLP</p> <p>An overview of the regulatory requirements you should have in mind when your clients are investing in Alternative Investments, including proficiency, suitability, disclosure and more.</p>
5:20	<p>CLOSING REMARKS Pat Bolland, Former BNN Anchor, Media Consultant</p>	
5:25 – 6:45	<p>EVENING RECEPTION <i>Sponsored by: Bermuda Business Development Agency</i></p>	

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FRIDAY, SEPTEMBER 14th

7:30 – 8:15	BREAKFAST <i>Sponsored by: Fundata Canada Inc.</i>
8:15 – 8:25	FIRST DAY RECAP <i>Pat Bolland, Former BNN Anchor, Media Consultant</i>
8:25 – 9:15	<p>PANEL: A GLOBAL ECONOMIC OUTLOOK IN A TIME OF VOLATILE POLITICS AND POLICY <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</i> <i>Dawn Desjardins, Vice-President & Deputy Chief Economist, Royal Bank of Canada</i> <i>Frances Donald, Head of Macroeconomic Strategy, Manulife Asset Management</i> <i>Brett House, Vice-President and Deputy Chief Economist, Scotiabank</i></p> <p>Leading Economists discuss wide-ranging issues facing the Canadian, US and global economies in a fast changing world of politics and policy and its impact on Investments.</p> <ul style="list-style-type: none"> • Current outlook for the Canadian, US and global economy • NAFTA effect & US immigration policy • US tension with China • Rising government and personal debt • Brexit update between EU and UK • Real Estate housing market • US government and securities regulation reform and its impact on Canada's securities
9:15 – 9:55	BERMUDA – WHERE THE FUNDS INDUSTRY MEETS BLOCKCHAIN <i>Sean Moran, Interim CEO, Bermuda Business Development Agency</i> <i>Lawrence C. Newhook, President & CEO, Alpha Innovations Ltd. & Laureate Digital Securities Ltd.</i>
9:55 – 10:15	NETWORKING BREAK <i>Sponsored by: IFSE</i>

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10:15 – 11:10	<p>FUND MANAGER SHOWCASE Traditional fund managers are looking to alternative strategies as more of a mainstream opportunity for their investors. Hear directly from fund managers discussing their products, theories and strategies. <i>Facilitator: Robert Gignac, Author: Rich is a State of Mind</i></p> <ul style="list-style-type: none"> • Ardenton Capital Corporation – Doug Zabkar, Chief Financial Officer, Ardenton Capital Corporation • ICM Asset Management – John Courtliff, Partner, Managing Director & Portfolio Manager, ICM Asset Management • Invico Capital Corporation – Goran Bodiroga, Associate Director, National Sales, Invico Capital Corporation • New Look Capital – Gavin Treanor, Vice President of Sales, Newlook Capital Inc. • Pulis Investments – Brian Pulis, Co-Founder & CEO, Pulis Investments • YTM Capital – Daniel Child, Founder and Co-Portfolio Manager, YTM Capital Credit Opportunities Fund
11:10 - 11:50	<p>BREAKING IN TO RETAIL DISTRIBUTION – A PRACTICAL OVERVIEW <i>Dennis E. MacPherson, Senior Vice President, SGGG Fund Services Inc.</i> In this presentation, investment fund operations expert Dennis MacPherson brings his 20+ years' experience supporting fund product issuers and dealers in distribution, investor recordkeeping and accounting administration services.</p> <ul style="list-style-type: none"> • Fundserv – Everything you need to know • Broker/Dealers – Steps to get approved by head office and put 'on the shelf' for advisors • IIROC – Regulatory considerations • Timing – Things you should know, think about, and do before contemplating accessing this channel • Operations – How to get it done and at what cost
11:50 – 1:20	<p>BUFFET LUNCH <i>Sponsored by: Northern Coast</i></p>
12:10 – 1:10	<p>ADVISORS AT RISK - HOW TO PROTECT YOUR BUSINESS <i>Ellen Bessner, Partner, Babin Bessner Spry LLP</i></p> <p>In this presentation litigation lawyer, Ellen Bessner, brings her 25+ years experience representing advisors, insurance agents and planners in regulatory, employment law and litigation matters to explain how they can grow and protect their business by offering solutions to the challenges associated with the current regulatory and legal environment. Advisors will gain insight into best practices for their organization that will help everyone sleep better at night. Topics will include:</p> <ul style="list-style-type: none"> • Exploring current trends, risks and challenges facing the investment and insurance industries • Examining the risks an advisor faces and how to protect their most valued assets: reputation, licence and money • Helping Advisors identify red flags before they turn into client complaints or litigation • Helping Advisors gauge compliance in order to analyze risks and resolve existing compliance issues

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1:20 - 2:00	<p>PANEL: TRENDS IN BLOCKCHAIN, BIG DATA, AND CRYPTOCURRENCIES <i>Moderated by: Doug Saxon, Venture Partner, OKR Financial</i> Lewis Bateman, Chief Business Officer, Coinsquare Martin Lalonde, Founder, President and Portfolio Manager, Rivemont Aryan Nava, Founder, Blockchain Mind Inc. Marc Van Der Chijs, Founder and Chief Strategy Officer, First Block Capital Inc.</p> <p>You will hear from fund managers that are actually investing in blockchain strategies, their investment outlook and regulatory update in this area. You will also hear from a firm that is actually engaged in the Blockchain technology. Robotix and Automation will also be discussed in this session.</p>
2:00 – 2:50	<p>PANEL: LEADING CEO'S PANEL <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</i> James Fox, Co-CEO, Managing Partner, Ninepoint Partners Cam Goodnough, CEO, Timbercreek Financial Mark Purdy, Managing Director & CIO, Arrow Capital Management Inc. Andrew Torres, CEO and Founder, Lawrence Park Asset Management</p> <p>The C-level executives will discuss a wide range of areas on the future of Alternative Investments, the challenges and opportunities facing Alternative iNvestment firms, regulatory changes and risks, distribution in Canada. The panel will also discuss their investment outlook and market outlook, investment risks and how to mitigate, opportunities in the current market environment and much more...</p>
2:50 - 3:00	<p>CLOSING REMARKS Pat Bolland, Former BNN Anchor, Media Consultant</p>

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