



FINAL AGENDA

Last updated: October 25, 2019

Monday, October 28th

Time	Session
1:00 – 2:00	Conference Registration
2:05	Opening Remarks Justin Warren, General Manager, Radius Financial Education
2:10	Moderator's Remarks Pat Bolland, Former BNN Anchor, Media Consultant
2:20	Panel: Global Economic Update in the midst of escalating US-China Trade Disputes, Brexit, Trump Impeachment Allegations, and Global Climate Risks Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant Craig Alexander, Partner & Chief Economist, Deloitte LLP Josh Nye, Senior Economist, RBC
3:10	Panel: Real Assets - Long Term Outperformance with Lower Volatility Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant John Courtliff, Partner, Managing Director & Portfolio Manager, ICM Asset Management Devon Cranson, Founder and President, Cranson Capital Dennis Mitchell, Chief Executive Officer and Chief Investment Officer, Starlight Capital Vikram Rajagopalan, Vice President, Retail Sales & National Accounts, Trez Capital

*Please note that, while every effort will be made to present the program as advertised, speakers, topics and timing are subject to change due to circumstances beyond our control.

*Radius Financial Education ("Radius") is pleased to provide the Fund Manager and EMP Showcase segments of the Summit for industry gathering. Radius's role is simply as a conference medium for hedge funds and alternative investments. Radius does not provide advice or investment recommendations and our facilitation of the product Showcase segments of the Summit should not be misconstrued as a recommendation from Radius regarding investing specifically in any of the funds showcased.



4:00	<p>Wealth and the Razure of Oblivion Pierre duPont, Partner, Cerity Partners</p> <p>Pierre discusses the history of his two multi-generational families and how they have remained 'cohesive' for as long as they each have. He outlines a few techniques his families (and others) have used to maintain 'heritage' across generations. He combines personal stories and family histories to illuminate steps you might take to increase the positive impact of your wealth (whether large or small, tangible or intangible) on your descendants while decreasing the negatives that often come with inherited wealth.</p>
4:40 - 5:20	<p>Keynote Session Randy Ambrosie, Commissioner of the Canadian Football League (CFL)</p>
5:30 – 7:00	<p>Radius’ Opening Tailgate Reception Sponsored by: CIFP</p>

Tuesday, October 29th

Time	Session
8:10 – 9:00	<p>Conference Registration And Breakfast Sponsored by: Fundata Canada</p>
9:00	<p>First Day Recap Pat Bolland, Former BNN Anchor, Media Consultant</p>
9:10	<p>Panel: Liquid Alternatives are a Blitz in Canada: Leading Fund Managers Discuss Strategies & Opportunities Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</p> <p>Mark Brisley, Managing Director & Head, Dynamic Funds Lillian Ferndriger, Vice President, National Accounts, Ninepoint Partners Wes Mills, Chief Investment Officer, OKR Financial</p>

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9:50	<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. Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</p> <p>Lending Loop - Reza Jafer, Head of Wealth Management Avenue Living Asset Management - Emily Newman, VP, Business Development Canadian Mortgages Inc. - Steve Fabian, Senior Vice President, Capital Markets, Canadian Mortgages Inc. Cranson Capital - Devon Cranson, Founder and President ICM Asset Management - John Courtliff, Partner, Managing Director & Portfolio Manager Ninepoint Partners - James Fox, Co-CEO, Managing Partner OKR Financial - Wes Mills, Chief Investment Officer</p>
11:00	<p>Networking Break Sponsored by: OKR Financial</p>
11:20	<p>ETF Trading and Liquidity Take a deeper dive into the true liquidity of ETFs including secondary versus primary market volume, market structure and execution strategies, trading best practices and examples of market volatility events. Bobby Eng, Vice President, Head of SPDR ETFS Canada, State Street Global Advisors</p>
11:50	<p>Family Office Roundtable: Evolving Investment Strategies and Trends Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</p> <p>Brian McKenzie, Partner, Chronicle Wealth Greg Moore, Vice President, Richter Family Office Zachary Schwartz, President, ZSC Inc. and Client Relations, East West Investment Management</p>

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12:30 – 1:30	Buffet Lunch Sponsored by: Ninepoint Partners
1:30	Panel: Effective Fund Strategies to "Hedge" Risk in Your Portfolio Moderated by: Zachary Schwartz , President, ZSC Inc. and Client Relations, East West Investment Management Jon Aikman , Co-founder, Nordai Stephen Harvey , Chief Risk Officer, Titan Advisors Wes Mills , Chief Investment Officer, OKR Financial
2:10	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. Moderated by: Pat Bolland , Former BNN Anchor, Media Consultant Invico Capital Corporation - James Wanstall , Vice President, Sales Centurion Asset Management Inc. - Matthew Barnes , Director of Sales MMCAP Asset Management - Justin Oliver , Business Development RISE Properties - Leslie Toth , Vice President of Sales and Marketing Titan Advisors - Aly Alladina , Vice President, Marketing, Canada Trez Capital - Vikram Rajagopalan , Vice President, Retail Sales & National Accounts
3:20	Networking Break Sponsored by: Street Capital
3:50	CEO Fireside Chat: Navigating the ship in a period of shifting Investor preferences, margin compression, regulatory developments and advancing technologies Moderated by: Pat Bolland , Former BNN Anchor, Media Consultant Raj Lala , President and CEO, Evolve ETFs Dennis Mitchell , Chief Executive Officer and Chief Investment Officer, Starlight Capital

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4:40	Closing Remarks Pat Bolland, Former BNN Anchor, Media Consultant
4:50 – 6:30	Evening Reception Sponsored by: State Street Global Advisors

Wednesday, October 30th

Time	Session
7:10 – 8:10	Breakfast Sponsored by: SGGG Fund Services Inc.
7:20	Introduction and Second Day Recap Pat Bolland, Former BNN Anchor, Media Consultant
7:30 – 8:10	Cyber Security: Events from the past year, and current threat landscape Robert Hudyma, Professor, Ted Rogers School of Management, Ryerson University
8:15	Fund Administration: What Fund Companies Need to Know Dennis E. MacPherson, Senior Vice President, SGGG Fund Services Inc.
9:00	Networking Break Sponsored by: CWB Maxium Financial
9:30	Cannabis Investing in North America Charles Taerk, President & Chief Executive Officer, Faircourt Asset Management
10:10	Fintech and Financial Innovations Related to Traditional and Alternative Investments Jon Aikman, Co-founder, Nordai

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WAIS 2019 CANADA

MARRIOTT ON THE FALLS
NIAGARA FALLS
OCTOBER 28-30

11:00 – 11:10	Closing Remarks Pat Bolland , Former BNN Anchor, Media Consultant
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