

LIVE IN-PERSON PROGRAM



IIAC Investment Professional Leadership Program, powered by Ivey

Elevate your investment practice to the next level and build for future success

PROGRAM OVERVIEW:

Investment professionals today face a shifting, disrupted business landscape. In addition to weathering market upheavals, effective investment advisors must navigate any number of complex and often competing stakeholder interests. Critical to success is the ability to cut through that complexity and understand all sides of the client-advisor-dealer-regulator equation.

The *Investment Professional Leadership Program*, from Ivey Business School, developed in collaboration with the Investment Industry Association of Canada (IIAC), is designed to help participants master the key skills for managing a professional and contemporary investment advisory business.

Throughout the program, you will hone your capabilities as a practice leader and develop the skills necessary to thrive in a new world of client expectations. Learn from top Ivey faculty and network with peers in the industry, developing the processes and practices you'll need to build a sustainable, enduring advisory firm.

WHO SHOULD ATTEND:

The *Investment Professional Leadership Program* is designed for mid-career investment professionals with 10-15 years of experience, who are looking to take their practice to the next level. Applicants must be referred by a member firm in the IIAC and then be approved by the program Faculty Director.

What You Learn

As a participant in the program, you'll put learning into practice and come away with real-world expertise.

1. Learn to identify the key trends and tidal forces driving the investment advisory business in Canada.
2. Practice key skills for leading a professional investment practice – including team management, behavioural finance, modern service models, delivering independent advice, integrating technology, financial management, communication in a digital world, and business development.
3. Position yourself and your team for sustainable success by reacting to the pandemic hangover, mastering difficult conversations, working with aggressive regulators, maintaining a competitive edge, running a business in a complex world, integrating digitization, and incorporating Environmental, Social, and Governance factors.
4. Elevate your personal agility, as well as mental and physical health. Navigate crisis management and tackle the unique challenge of communicating with 140 Characters.
5. Apply learning takeaways in the context of your unique business; develop and implement an action plan to position yourself and your organization on a master-level trajectory.
6. Plan for your ongoing development as an industry professional – ensuring your capability to thrive as a master wealth advisor in an uncertain future.

MODULE 1: CONTEXTUAL AWARENESS

Location: Southern Ontario (*3½ days in-person learning*)

A combination of keynote speakers and real-world case discussions with Ivey scholars, along with peer-based exercises, personal and group reflections.

- Leadership agility and leading collaboratively
- Understanding wealth advisory in a shifting landscape and adapting to agility as the new normal
- Decision making during uncertainty and complexity
- Business development in the new world
- Finding your voice as a leader
- Navigating conflict and crisis management

MODULE 2: BUILDING TRUST

Location: Western Canada (*3 days in-person learning*)

A combination of keynote speakers, briefings and lectures with industry experts and scholars, along with peer-based exercises, personal and group reflections.

- Mastering difficult and crucial conversations
- The Pandemic Hangover as it relates to financial services
- The digital world and integrating technology into practice
- Integrating your Dealer's perspective
- Creating value in a professional practice
- Integrating ESG
- Running a complex business in a complex world
- Behavioural finance in practice.

MODULE 3: STRATEGIC ACTION

Location: Offline

- Over the next month, work in peer groups and mentors to craft an Action Learning Project – both for yourself and your business – articulating specific steps to take your practice to the next level. As a capstone project, deliver your personalized action plan to your executive sponsor for feedback.

MODULE 4 (ON-SITE): LOOKING FORWARD

Location: Donald K. Johnson Center, Toronto, ON
(1 day in-person learning)

- Through a final in-person experience, take part in a facilitated debrief between participants and industry mentors. Discuss key takeaways and review peer presentations, before joining your new community of peers for a special Graduation and Celebration event.

“This experience has made me realize that I need to be agile; I need to adapt. And I need to spend time on some areas of leadership that I might not have thought were important. The quality of the content from both industry experts and Ivey faculty has been stellar – I’m getting so much that I can apply in my practice.”

DIANE PERRY

3Macs – Raymond James



Program ROI

Upon completion of the *IIAC Investment Professional Leadership Program*, powered by Ivey, you will receive the Ivey Certificate in Leadership (Investment Professionals) and the related digital credential from Ivey. Your digital badge is embedded with a unique URL – helping you showcase your commitment to professional development. You can display badges on social media, websites, and professional networks. The program is also expected to qualify for approximately 10 hours CE credit (application pending).

In the *Financial Times* rankings of the world’s leading providers of executive education programs, The Ivey Academy has been ranked #1 overall for 18 of the past 20 years. You’ll join a network of more than 10,000 professionals from all industries and sectors. The Academy alumni network is a long-term resource for participants to share business opportunities or seek advice. Ivey Academy alumni also become part of the Ivey Business School community, spanning 40,000 alumni in 80 countries.

IVEYACADEMY.CA

T: +1.519.661.3272

TF: 1.800.948.8548
(NORTH AMERICA)

E: INFO@IVEYACADEMY.COM

How You Learn

Ivey Academy programs are deeply experiential, grounded in case research, and facilitated by expert faculty from Ivey Business School. Our real-world Case Method of Learning is not about textbooks and lectures – it's about learning by doing. You'll identify specific, practical learning takeaways through deep discussion and simulations, then develop an implementation plan with feedback from other leaders. You'll complete the program having gained new skills, heard insights from peers, and developed a clear strategy to tackle specific challenges back at work.



Faculty-led Sessions

Ivey faculty guide the class through real-world case discussions, drawing out key learning takeaways along with new ideas and perspectives. Individuals are encouraged to actively engage with peers and faculty to help bring new viewpoints to the learning experience.



Industry-led Sessions

Industry experts will guide the class with real-world discussions, briefings and exercises with a focus on world-class best practices for professional advisory firms.



Action Learning Projects

Action Learning Projects give program participants an immediate context to apply their takeaways. By referencing your own business challenges throughout the program, you'll have the opportunity to build an action plan with invaluable feedback from other leaders and an industry mentor. Your Action Learning Project, which you present to your sponsor, can be directly applied to your advisory practice moving forward in your career.



Peer Learning Sessions

Participants break out into smaller groups, sharing experiences, exchanging ideas, and collaborating to solve challenges together with other leaders before bringing shared insights back to the classroom. Working with an industry mentor, each group exchanges peer feedback on their specific Action Learning Project challenges.

APPLY NOW



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▶ IIAC INVESTMENT PROFESSIONAL LEADERSHIP DEVELOPMENT PROGRAM

MODULE 1	Sunday, April 16 – Wednesday, April 19 2023 at Ivey Spencer Leadership Centre, London, ON
MODULE 2	Monday, May 15 – Wednesday, May 17 2023 at Banff Centre for Arts & Creativity, Banff, AB
MODULE 3	Thursday, June 15 – Friday, June 16 at Ivey Donald K. Johnson Centre in Toronto
PROGRAM FEE	\$12,500 Fee includes accommodations and meals for in-person sessions as well as all learning materials. Fee does not include travel costs.