INVESTMENT MANAGEMENT SUMMIT
The Transformation the Wealth Industry

DATE: Tuesday June 20, 2023

LOCATION: Park Hyatt, Park Hyatt Ballroom, 4 Avenue Rd, Toronto

DESCRIPTION: This conference brings together the rainmakers of the Canadian Wealth industry to provide consolidated insights like never before.

The past few years have been challenging for asset and wealth management firms in Canada. The changing demographic in Canada is accelerating the transfer of wealth. Coupled with the increase in technological innovations (as both a valuable tool and a market disruptor), the result has been a shift in investor expectations. Market competition has intensified, and firms must employ new strategies to keep pace. As we look ahead, we want to thrive, not simply survive.

We are pleased to present a high-profile roster of internationally recognized and award-winning speakers, industry leaders, field experts and disruptors, that will provide insight into how to manage transformation for maximum future success.

8:00 am – 8:55 am **Breakfast & Registration**

8:55 am – 9:00 am **Welcome** – Laura Paglia, President & CEO, IIAC

9:00 am – 10:00 am **The Long Game: The Future of Wealth and Asset Management in Canada**

When it comes to the future, it has been said that the road to success is holistic, hybrid and digitally enabled. These panelists will give us a view of the Canadian investment landscape through their lenses and discuss the future of asset management in Canada.

Moderator: Ian Tam, Director of Investment Research, Morningstar Canada

Speakers: David Bardsley, Partner, Partner, Head of Wealth & Asset Management Advisory, KPMG Canada
Marcia Moffat, Managing Director, Country Head of Canada, BlackRock

10:00 am – 10:45 am	**ESG, ISSB Standards and Sustainability Disclosures in the Capital Markets** The International Sustainability Standards Board (ISSB) is finalizing requirements for an entity to disclose information about its climate-related risks and opportunities. Sustainability factors are becoming a mainstream part of investment decision-making, so this matters. There are increasing calls for companies to provide high-quality, globally comparable information on sustainability-related risks and opportunities. There is also a strong desire to address a fragmented landscape of voluntary, sustainability-related standards and requirements that add cost, complexity and risk to both companies and investors. Jingdong Hua, Vice-Chair of the ISSB, in his accessible and affable style, will walk us through the new standards. Mr. Hua has brought a wealth of international finance and development expertise to the ISSB. He is the former Vice President and Treasurer of the World Bank, where his responsibilities included green bond initiatives and sustainable finance capacity-building programs. He also served as the Administrator of the World Bank Group Pension Fund.
Speaker:	Katie Schmitz Eulitt, Director Outreach, Global Investors, IFRS Foundation
10:45 am – 11:15 am	***Networking Break***
11:15 am – 12:15 pm	**Strategic Insights, Sales, and Navigating the Complex Waters of the Industry** There are real challenges to developing products and services that cater to evolved investor needs and wants, while considering the aging population and demographic shifts we are facing. The challenges are punctuated by the prominence of social media and investor perceptions of their astuteness in investing. How can firms ensure that the connections with investors and advisors are effective? Is the competition for shelf-space real? Is there room for everyone? This panel of leaders will tackle how they manage today while focusing on the future success of their firms.
Moderator:	Kim Parlee, Host, MoneyTalk, BNN Bloomberg and CTV
Speakers:	Jordy Chilcott, President, Wellington-Altus Private Wealth & EVP, Wealth Strategy & Enablement, Wellington-Altus Financial Inc. Erin Greenfield, President, Portfolio Manager, Greenfield Investment Management Jennifer Sinopoli, SVP, Head of Distribution Central Canada at CI Global Asset Management

12:15 pm – 1:00 pm	***Lunch***
1:00 pm – 1:45 pm	**Lunch Keynote: Shifting Demographics and Our Financial Future** In contemporary Canada, individuals' identities are no longer defined by traditional demographic markers such as age, race, gender, and class, but by their personal values and worldviews aspect of their existence. How will this shift impact the financial industry of the future? Based on his research and extensive writing on our evolving identity and our open attitudes toward diversity and multiculturalism, author and noted commentator on social values and social change in North America, Michael Adams, will walk us through how the uniqueness of our current demographic shift will impact our financial future, and how we can prepare for it.
Speaker:	Michael Adams, Founder & President Environics Institute, and Bestselling Author
1:45 pm – 2:30 pm	**Portfolio Construction & Managing Investment Risk Along the Way** The only constant in portfolio management is change. With the advent of digital currencies, ESG factor requirements and advanced technologies, oversight and risk management of strategies has become increasingly complex. Whether reviewing fixed income, equity, quantitative or synthetic mandates or other asset classes, performance oversight and risk monitoring has become increasingly complex. How is performance measurement used to calculate, quantify, and understand the drivers of performance for all investment portfolios? This engaging panel will discuss how quantifying the inherent risks of each portfolio is critical to ensure mandate expectations are met.
Speaker:	Jeff Hyrich, Partner and Global Equity Specialist, Edgepoint Wealth Steven Wood, Director, Head of Investment Risk, Scotia Global Asset Management
2:30 pm – 3:00 pm	***Networking Break***

3:00 pm – 3:45 pm	**It's Time to Put Back-Office at the Forefront** Innovation and advancements in the investment industry are often accompanied by regulatory or technical challenges (or both!). In the age of T+1, Total Cost Reporting and product innovation, we have learned that having streamlined and efficient back-office operations are vital to successful business performance, greater efficiency and better customer service. But updating back-office systems to meet the demands of a rapidly changing business landscape can be challenging and time-consuming. How can you be sure you are getting it right?
Moderator:	Scott Wilkinson, Head Canada Business Development, Broadridge
Speakers:	John Carinci, SVP & Head, Global Operations, RBC Wealth Management Christine Rodrigues, SVP & COO, National Bank Independent Network Joanna Simon, National Head of Markets, UBS Wealth Management David Tasker, SVP, Raymond James Correspondent Services
3:45 pm – 4:45 pm	**View From the Top – Leaders Panel** There are those that follow, and those that lead. We are pleased to have gathered some of the rainmakers of the Wealth and Investment Management industry in Canada to provide their views and insights for the future.
Moderator:	Pattie Lovett-Reid, Chief Financial Commentator, HomeEquity Bank
Speakers:	Kish Kapoor, President & CEO, Richardson Wealth Rohit Mehta, President & CEO, Horizons ETFs Dennis Mitchell, CEO & CIO, Starlight Capital Oricia Smith, President, SunLife Global Investments Asset Management
4:45 pm - 4:50 pm	**Closing Remarks –** Jasmin Jabri

Networking Reception
5:00 pm – 6:30 pm