



# 2016 IIAC CYBERSECURITY CONFERENCE

Date: June 14, 2016  
Place: St. Andrews Club and Conference Centre  
150 King Street West, 16<sup>th</sup> Floor (Garden Suite), Toronto

*Presenting Sponsor*



**7:45 – 8:15 a.m.**      *Breakfast and Registration*

**8:15 – 8:30 a.m.**      **Welcome: Ian Russell, President and CEO, IIAC &  
Susan Copland, Managing Director, IIAC  
Opening Remarks: Philip Wright, Managing Director, CanDeal Solutions**

**8:30 – 9:30 a.m.**      **SESSION ONE: Cyber Threats 2016 – Ransomware, Phishing Scams and the  
Increasing Risk for Financial Services**

Cyber criminals targeting the financial industry are becoming increasingly sophisticated and effective. Discover what the upcoming, current and most damaging threats are circulating in cyberspace. How identify the threats, and protect yourself and your business from falling victim.

**Speaker: Larry Keating, President and CEO, NPC Dataguard**

**9:30 – 10:30 a.m.**      **SESSION TWO: Legal, Privacy and Other Liability Considerations – Before, During  
and After a Breach**

In addition to protecting your firm and client information during a cyber incident, it is critical to take steps to ensure your firm is protected to the greatest degree possible from the serious legal and regulatory implications that can arise when sensitive data is compromised. This presentation will take you through the matters you should consider before, during and after a data breach to minimize your exposure, and mitigate the damage and liability arising from a cyber incident.

**Speaker: Adam Kardash, Partner, Osler, Hoskin & Harcourt LLP**

**10:30 – 10:50 a.m.**      *Morning Break*

**10:50 – 11:50 a.m.**

**SESSION THREE: Comparing the U.S. vs. Canadian Cyber Regulatory Framework – Application of the US Experience to the Canadian Context**

Canadian and US industry regulators and panelists will discuss the evolution of cybersecurity regulation in the US and Canada – how did we get here and what is on the horizon for both countries. Panelists will identify the challenges and provide insight into what we might expect, based on the similarities and differences in the Canadian and US experience.

**Speakers:**

- ❖ Susan Copland, Managing Director, IIAC (Moderator)
- ❖ Maysar Al-Samadi, Vice President, Professional Standards, IIROC
- ❖ Richard Livesley, Director, Canadian Programs, FS ISAC
- ❖ Steven Polansky, Senior Director Regulatory Programs, FINRA
- ❖ Thomas M Wagner, Managing Director, Financial Services Operations, SIFMA

**11:50 a.m. – 1:00 p.m.**      *Networking Lunch*

**1:00 – 2:15 p.m.**

**SESSION FOUR: How to Survive a Data Breach**

The sensitive and valuable nature of information held in investment firms make them prime targets for cyber criminals. Experience has demonstrated that even top-tier security systems and IT safeguards are fallible. So, what do you actually do if you experience a data and/or network security incident? Who do you call? What will they do and what are your responsibilities and liabilities to your clients? Our panel of experts will provide their insights and practical guidance for what an organization can do to survive network security and/or privacy liability breach, including:

- What key protocols you should have in place?
- What are the kinds of professional service providers that you should consider engaging?
- Preparing a timeline and knowing which steps to take and when to take them
- Typical obstacles that are encountered through the process

**Speakers:**

- ❖ Adam Briklyn, President and Co-Chair, ProRISK Underwriters (Moderator)
- ❖ Barry Boyd, Director of Sales & Marketing, idAlerts Canada Inc.
- ❖ Alex Cameron, Partner, Fasken Martineau LLP
- ❖ Joseph Coltson, Managing Director, Duff & Phelps

**2:15 – 2:30 p.m.**

*Afternoon Break*

**2:30 – 3:30 p.m.**

**SESSION FIVE: Engaging and Evaluating Vendors - Due Diligence and Other Considerations**

In the highly interconnected financial industry, cybersecurity does not begin and end within the boundaries of your firm's systems. Vendors and third party service providers provide a way in, and a way out of your infrastructure – exposing your firm and its clients to threats over which you may not have any control. It is critical to ask the right questions and develop the appropriate controls to ensure you are protected from problems originating from those whose services interconnect with your systems. The panel will discuss due diligence, safeguards and liability protection to expand your scope of cybersecurity.

**Speakers:**

- ❖ Willy Jeung, Chief Technology Officer, Fidelity Clearing Canada
- ❖ Michael Werneburg, Director, Business Risk & Opportunity, Portfolio Aid
- ❖ Andrew Chester, President, Juno Risk Solutions

**3:30 – 4:30 p.m.**

**SESSION SIX: Practical Risk Management – Cybersecurity Insurance Perspective**

Data breaches can have significant legal, reputational and other ramifications for organizations of all sizes. Part of any complete cybersecurity program includes insurance, to mitigate the damage when it occurs. Experts in this evolving field will provide guidance in tailoring your insurance program based on your business model through a discussion of:

- Current trends in privacy breaches, from the insurance company perspective
- Key tips for managing and transferring risk
- The Cyber Liability insurance policy – what does it provide and how does it fix gaps in current coverage

**Speakers:**

- ❖ **Patrick Bourk, Senior Vice President, Management Risk Practice Leader, Integro Insurance Brokers**
- ❖ **Matthew Davies, Assistant Vice-President, Professional, Media & Cyber Liability, Chubb Insurance**

**4:30 – 4:45 p.m.** *Closing Remarks – Susan Copland, Managing Director, IIAC*

**4:45 – 5:45 p.m.** *Cocktail Reception – Sponsored by CanDeal Solutions*

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