

# Agenda

8:00 – 8:30 AM

## Breakfast and Registration

Co-sponsored by:



8:30 – 8:35 AM

## Welcome Address

The Master of Ceremonies for the day, Preet Banerjee will provide the opening remarks.



Presenter:  
Preet Banerjee  
Personal Finance Expert

8:35 – 9:00 AM

## Chair's Opening Keynote

IFIC's newly elected board chair, John Adams, will set the themes for our day, framing the questions we'll be pursuing throughout the panels and sessions. Our chair will highlight the most important trends emerging in the industry today and challenge us to address the difficulties they may present, while seeking out opportunities they hold for future growth and development of the industry.



Presenter:  
John Adams  
CEO  
PFSL Investments Canada Ltd.  
Chair Board of Directors  
The Investment Funds Institute of Canada

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9:00 – 10:00 AM

## Leaders Panel

Our annual Leaders Panel will provide an insider's perspective on top of mind topics for some of the industry's foremost CEOs. Our guests will draw on their extensive experiences to discuss current business and regulatory trends, both in Canada and abroad, what they will mean for Canada's investors, and the opportunities for the industry that they see on the horizon.



Moderator  
Joanne De Laurentiis  
President and CEO  
The Investment Funds Institute of Canada



Panellist  
Paul Lorentz  
Executive Vice-President and General Manager,  
Retail Markets and President of Manulife Investments,  
Manulife Financial



Panellist  
Carol Lynde  
President and Chief Operating Officer  
Bridgehouse Asset Managers



Panellist  
David Scandiffio  
President and CEO  
CIBC Asset Management

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10:00 – 10:15 AM

## Break

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10:20 – 11:30 AM

## International Panel

Back by popular demand, but with new voices at the table, our international panel of senior executives from international funds associations will give us updates on developments abroad. They'll share their insights into the

different paths regulators are taking to reach their common goals of protecting investors and enhancing the investor experience. Our panel will share their own and third party observations around the impacts that regulatory initiatives in their own jurisdictions are having on investors and the industry, and lessons that can inform discussions about Canada's future regulatory framework.



Moderator  
**Jordy Chilcott**  
 Managing Director and Head of Scotiabank Global Asset Management – Retail & Wealth Mexico

President and CEO  
 Dynamic Funds



Panellist  
**Jonathan Lipkin**  
 Director of Public Policy  
 The Investment Association (U.K.)



Panellist  
**Susan Olson**  
 Chief Counsel  
 ICI Global



Panellist  
**Alison Wheatley**  
 Special Counsel  
 Herbert Smith Freehills (Australia)

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**11:30 – 12:20 PM**  
**Guest Speaker**

Admiral Stavridis will close off our morning sessions with his perspectives on geopolitics and global security. A highly decorated Navy admiral and the longest-serving global combatant commander in recent American military history, James Stavridis is a “Renaissance Admiral” according to The New York Times. Widely recognized for his expertise in strategy, tactics, diplomacy, national security and strategic communications, Stavridis provides regular global affairs and security commentary in a wide variety of publications from The Washington Post to The Atlantic magazine. A visionary with over three decades in uniform who now leads one of the nation's most prestigious graduate schools of international relations, Stavridis offers a global overview of risks, opportunities and strategies for successfully creating a secure nation, government and business community. His “tour d’horizon” is very effective for business audiences investing worldwide.



Guest Speaker  
**Admiral James Stavridis**  
 USN (Ret.)

Sponsored by:



**12:20 – 12:45 PM**  
**Lunch Reception**

**12:45 – 1:40 PM**  
**Lunch**

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**1:45 – 4:10 PM**  
**Featured Tracks**

Please see pages 10 – 12 for more details.

**4:20 PM (Concert Hall)**  
**Return to Plenary**

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**4:20 – 4:50 PM (Concert Hall)**  
**Closing Remarks**



Guest Speaker  
**The Honourable Charles Sousa**  
 Ontario Minister of Finance, M.P.P.

**4:50 – 6:00 PM**  
**Cocktail Reception**

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