

## Operations Day 2016 Agenda

8:00am – 9:00am	Breakfast and registration
9:00am – 9:15am	Welcome and introduction
9:15am – 10:00am	<p><b>Cybersecurity: <i>An Operations Perspective</i></b></p> <p>Cyber-attacks take place daily around the world. How vulnerable is your firm? Gain practical tips from experts within and outside our industry on what operations professionals need to know.</p>
10:00am – 10:15am	<b>B R E A K</b>
10:15am – 11:00am	<p><b>Taxation Update:</b> Hear the latest on tax matters and tax reporting rules, such as the OECD's Common Reporting Standard (CRS) to be implemented in 2017, the status of FATCA implementation, and more.</p>
11:00am – 11:45pm	<p><b>Fundserv update:</b> Hear about the latest developments in electronic business services, product enhancements and priorities for the upcoming year.</p>
11:45pm – 1:15pm	<b>L U N C H</b>
1:15pm – 2:00pm	<p><b>T+2 Settlement Update:</b> Plans are underway to move Canada's capital markets to a T+2 settlement cycle, to align with the U.S. implementation date of September 5, 2017. Learn what you need to do to be ready.</p>
2:00pm – 2:45pm	<p>CRM2: By July 25 2017, all firms will have completed their initial delivery of the new client reports on charges/compensation and performance required under CRM2. With implementation now well in hand, it's time to shift the focus to client communication, education and retention.</p>
2:45pm – 3:00pm	<b>B R E A K</b>
3:00pm – 3:45pm	<p>Operations Working Group Update: Group members will update the audience on recent initiatives it has concluded and current issues it is working on, such as electronic signatures. They'll be also seeking attendees input into the Group's future agenda.</p>
3:45pm – 4:00pm	<b>Closing Remarks</b>
4:00pm – 6:00pm	<b>Cocktail Reception</b>