

2020 IFIC ANNUAL LEADERSHIP CONFERENCE

<p>8:30 a.m. – 8:45 a.m.</p>	<p>Welcoming Remarks</p>
<p>8:45 a.m. – 9:45 a.m.</p> <p>INTERNATIONAL LEADERS PANEL</p> <p>The impact of the COVID-19 pandemic has been profound. Our panel of investment funds industry association CEOs will share their perspectives on three key global markets – the US, the UK and Brazil. In addition to exploring the unprecedented developments in their national investment funds markets, they will discuss: the impact of the pandemic on the fund industry both today and tomorrow, regulatory relief to manage market volatility, fund industry adaption to continue to serve clients and assist them through difficult and uncertain markets, mutual fund investor behaviour in times of market stress, the role of financial advice in the crisis, and future challenges and opportunities.</p>	<p>Panelists: Chris Cummings, President and CEO, Investment Association (UK) José Carlos H. Doherty, Superintendent General, Brazilian Financial and Capital Markets Association Paul Schott Stevens, President and CEO, Investment Company Institute (US)</p> <p>Moderator: Carol Lynde, Board Chair, IFIC</p>
<p>9:45 a.m. – 9:55 a.m.</p>	<p>Break</p>
<p>9:55 a.m. – 10:10 a.m.</p> <p>2020 POLLARA INVESTMENT FUND RESEARCH REPORT</p> <p>Pollara Strategic Insights Vice President, Lesli Martin, will share findings from the 2020 survey of mutual fund and exchange-traded fund investors. This survey has been tracking investor attitudes, expectations and understanding since its inception in 2006. The 2020 survey features insights on a number of topics including confidence in mutual funds and ETFs, advisor satisfaction, use of online brokerages and robo-advisors, attitudes toward responsible investing, fee knowledge, and satisfaction with fee and performance statements.</p>	<p>Lesli Martin, Vice President Pollara Strategic Insights</p>

10:10 a.m. – 11:05 a.m.

CANADIAN LEADERS PANEL

Our panel of executives will reflect on the findings of the 2020 Pollara report, which captured Canadian mutual fund and ETF investor perceptions in the midst of a global pandemic. In addition to reviewing how the industry met client needs in these unprecedented circumstances, panelists will scan the horizon and discuss the path ahead. What did we learn during the crisis? What weaknesses were exposed? Did anything change for the better? These questions and more will be tackled.

Panelists:

[Kathleen Bock](#), Head of Vanguard Americas and Managing Director, Vanguard Canada

[Neal Kerr](#), Head, Scotia Global Asset Management (Canada)

[Bernard Letendre](#), Head of Wealth and Asset Management, Canada Manulife Investment Management

[Damon Murchison](#), President and Chief Executive Officer, IG Wealth Management

Moderator:

[Clare O’Hara](#), Reporter, The Globe and Mail

11:05 a.m. – 11:15 a.m.

BREAK

11:15 a.m. – 12:15 p.m.

REGULATORY LEADERS PANEL

2020 will be remembered as a year of massive challenge and change. In addition to significant “normal” regulatory consultations and reforms, regulators have had to contend with the extraordinary turmoil caused by the global pandemic. Our panel of senior regulatory leaders will discuss the impact of COVID-19, as well as the many other ongoing issues facing Canada’s largest securities markets. Learn about their key regulatory priorities, the impact of technological innovation, the role of self-regulatory organizations, what the “new normal” will look like, and other matters affecting the Canadian capital markets and the investment funds industry.

Panelists:

[Brenda Leong](#), Chair, British Columbia Securities Commission

[Stan Magidson](#), Chair, Alberta Securities Commission

[Louis Morisset](#), President and CEO, Autorité des marchés financiers

[Grant Vingoe](#), Interim Chair, Ontario Securities Commission

Moderator:

[Paul Bourque](#), President and CEO, IFIC

12:15 p.m. – 12:30 p.m.

Closing Remarks