

# 2022 ANNUAL LEADERSHIP CONFERENCE



## What's Next? – Now What?

<p>8:00 a.m. – 8:45 a.m.</p>	<p><b>Breakfast &amp; Registration</b></p>
<p>8:45 a.m. – 8:50 a.m.</p> <p>CONFERENCE MC WELCOME</p>	<p><a href="#">Bruce Sellery</a>, Business Journalist   Bestselling Author of Moolala</p>
<p>8:50 a.m. – 9:00 a.m.</p> <p>IFIC CHAIR'S OPENING REMARKS</p>	<p><a href="#">Rick Headrick</a>, President, Capital International Asset Management (Canada)</p>
<p>9:00 a.m. – 9:50 a.m.</p> <p>OPENING KEYNOTE</p> <p>Our opening guest speaker Professor Janice Gross Stein will set the stage by reviewing current global issues and how they affect us here in Canada. She is a leading political scientist and expert in foreign relations, and she will share her unique perspectives on what is really happening around the world today. From Russia and Ukraine, China, the Middle East and Europe, there is no shortage of complexities to consider. Professor Stein will connect the dots and provide a look at where things are headed, and where the potential dangers and opportunities may lie.</p>	<p>Professor <a href="#">Janice Gross Stein</a>, Founding Director of the Munk School for Global Affairs and Public Policy, University of Toronto</p>
<p>9:50 a.m.- 10:50 a.m.</p> <p>FIRESIDE CHAT WITH ANDREW KRIEGLER</p> <p>In January 2023, IIROC and the MFDA will be consolidated to form a new self-regulatory organization. Andrew Kriegler – current CEO of IIROC and the newly-named CEO of the New SRO – will join IFIC's CEO Paul Bourque for a conversation about what's next. What are the integration challenges that lie ahead? What is the opportunity for the New SRO to provide value to members, regulators and investors? In addition, their discussion will cover updates on IIROC's initiatives and key priorities, as well as key developments, including total cost reporting, regulatory burden reduction and more.</p>	<p><a href="#">Paul Bourque</a>, President and CEO, IFIC</p> <p><a href="#">Andrew Kriegler</a>, President and CEO, IIROC and Incoming CEO, New SRO</p>

<p><b>10:50 a.m. – 11:10 a.m.</b></p>	<p><b>Morning Networking Break</b></p>
<p><b>11:10 a.m. – 12:10 p.m.</b></p> <p><b>LEADERS PANEL</b></p> <p>Our panel of industry leaders will reflect on how the investment funds industry has evolved over the last two years of unprecedented change and disruption. What have we learned, good and bad? The panel will also scan the horizon and discuss the new challenges to come. Front and centre are talent management questions: retaining and recruiting staff, including new advisors; and bringing staff back to the office in a new work era with changed employee expectations. Uncertainty is certain - how will the industry change to get ready for the next curveball?</p>	<p><b>Moderator:</b>  <a href="#">Bill Packham</a>, President &amp; CEO, Aviso Wealth</p> <p><b>Panelists:</b>  <a href="#">Patricia Callon</a>, Senior Vice-President and General Counsel, Sun Life Canada</p> <p><a href="#">Duane Green</a>, President and Chief Executive Officer, Franklin Templeton Canada</p> <p><a href="#">David Scandiffio</a>, President &amp; CEO, CIBC Asset Management</p>
<p><b>12:10 p.m. – 1:10 p.m.</b></p>	<p><b>Buffet Lunch</b></p>
<p><b>1:10 p.m. – 1:25 p.m.</b></p> <p><b>IFIC CEO REMARKS</b></p>	<p><a href="#">Paul Bourque</a>, President and CEO, IFIC</p>
<p><b>1:25 p.m. – 2:25 p.m.</b></p> <p><b>FUTURE OF ADVICE PANEL</b></p> <p>The findings of the 2022 Pollara Mutual Fund and ETF Investor Survey will provide the starting point for this panel’s discussion about key trends in advice. While research demonstrates that advice adds significant value, the industry will have to find innovative ways to demonstrate this value to their clients. Investor expectations are changing rapidly and the future of advice will be very different from the past. How will demographics shape advice as a product? Our panel of industry experts will also explore the impact of technology and regulatory reform on the advisory relationship and what lies ahead.</p>	<p><b>Moderator:</b>  <a href="#">Bruce Sellery</a>, Business Journalist   Bestselling Author of Moolala</p> <p><b>Panelists:</b>  <a href="#">Tim Prescott</a>, SVP, Head of Asset Management, Aviso Wealth</p> <p><a href="#">Susan Silma</a>, Head, Risk and Regulatory Business Practices at Sun Life Distributors</p> <p><a href="#">Michael Walker</a>, Vice President &amp; Head, Mutual Funds Distribution &amp; RBC Financial Planning, RBC</p>
<p><b>2:25 p.m. – 2:45 p.m.</b></p>	<p><b>Afternoon Networking Break</b></p>

2:45 p.m. – 3:45 p.m.

ESG STRATEGY PANEL

Against a backdrop of a receding global pandemic, increasing climate catastrophes and the invasion of Ukraine, ESG issues are top of mind for investors and beneficiaries who are keen to have their investments align with their values. How does the industry respond to this demand? How do organizations meet this strategic business imperative? Our panel brings together industry leaders involved in integrating ESG objectives into their organizations' overall corporate strategies to discuss how the industry can meet the moment and set the stage for the future.

**Moderator:**

[Patricia Fletcher](#), Chief Executive Officer, Responsible Investment Association

**Panelists:**

[Kelly Gauthier](#), MBA, President, Rally Assets

[Karrie Van Belle](#), Chief Marketing and Innovation Officer, AGF

[Barbara Zvan](#), President and CEO, University Pension Plan

3:45 p.m. – 4:30 p.m.

CLOSING KEYNOTE

Award winning author, speaker and educator Dan Breznitz is our closing guest speaker. He is one of the world's most renowned authorities on innovation policies and economic growth and a pioneering scholar of innovation and inequality and the ways to solve them. Professor Breznitz brings a unique voice into questions about innovation, globalization, economic growth, local prosperity and inequality. His experiences in multiple countries and multiple roles makes him one of the world's most dynamic thinkers, speakers and policy developers.

Professor [Dan Breznitz](#), Munk Chair of Innovation Studies and Co-Director of the Innovation Policy Lab, University of Toronto

*\* In-person attendees will receive a copy of Professor Breznitz's latest book – [Innovation in Real Places](#).*

4:30 p.m. – 4:40 p.m.

Closing Remarks

4:40 p.m.

Cocktail Reception