



SPEAKER QUOTES

“For over 10 years, Advocis has spoken out about the risk that the lack of title protection for financial advisors and planners represents to the financial health of Canadians. With the impending regulation of the titles ‘financial advisor’ and ‘financial planner’ in Ontario, it’s critical that we have a good debate to get the details right. Symposium continues to offer a platform for financial services participants to further this debate and find common ground.”

Greg Pollock, *President and CEO, Advocis*

“The Ontario government’s regulatory burden reduction initiative offers an unprecedented opportunity for the OSC to modernize and streamline securities regulation. Symposium 2019 will provide a forum for an inclusive debate where industry stakeholders can exchange views on how to achieve leaner and smarter regulation that keeps consumers protected.”

Curtis Findlay, *President Compfin Management Ltd. and Chair, Investment Sub-Committee, Advocis*

“Canada is going through a period of demographic transformation wherein financial advisors will need to be prepared to service the evolving needs of both Generation X and millennial tech-savvy consumers. Clients are not homogeneous, and advisors need to understand how to best serve their diverse needs.”

Shannon Lee Simmons, *Founder, New School of Business*

“We are hard-wired to make bad decisions about money. As a species, we’ve spent most of our time focused on short-term goals: putting food in our bellies, procreation, and generally just staying alive. But all financial decisions can be boiled down to long-term trade-offs. Exchanging something today for something tomorrow... or not. So the processes that we developed over most of our evolution which were great at keeping us alive in the moment are the same processes that can do us harm when making long-term decisions about money.”

Preet Banerjee, *Financial Panelist on CBC’s The National and Global’s The Morning Show*

“It is not enough that we do the right thing. We must be seen as doing the right thing.”

Rod Burylo, *Associate Portfolio Manager, Business Development Manager, Western Canada, Croft Financial Group*