

AGENDA

8:00 AM TO 8:50 AM

REGISTRATION & BREAKFAST

8:50 AM TO 9:00 AM

WELCOME BY EMCEE

Rob McCullagh CFP, CLU, CH.F.C., CHS

9:00 AM TO 9:15 AM

OPENING REMARKS BY

The Honourable Rod Phillips
Ontario Minister of Finance

9:15 AM TO 10:15 AM

TITLE PROTECTION COMES TO ONTARIO

MODERATOR

Clare O'Hara
Wealth Management Reporter, The Globe and Mail

SESSION PANELISTS

Ali Ghiassi
Vice President, Industry Affairs and Government Relations, Canada Life

Glen Padassery
Executive Vice President, Policy, Financial Services Regulatory Authority of Ontario

Greg Pollock M.Ed., LL.M., C.Dir., CFP
President and CEO, Advocis

10:15 AM TO 10:35 AM

COFFEE BREAK

10:35 AM TO 11:35 AM

REDUCING THE REGULATORY BURDEN

MODERATOR

Minal Upadhyaya
Vice President, Policy and Senior Associate General Counsel, The Investment Funds Institute of Canada

SESSION PANELISTS

Brad Beuttenmiller
Senior Associate General Counsel, Legal, Franklin Templeton

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

Debra Foubert J.D.
Director, Compliance and Registrant Regulation, Ontario Securities Commission

Naizam Kanji
Director of the Office of Mergers & Acquisitions, and Special Advisor to the Chair, Regulatory Burden Reduction, Ontario Securities Commission

AGENDA

11:35 AM TO 12:35 PM

SPECIAL KEYNOTE SPEAKER

Preet Banerjee

Financial Panelist on CBC's *The National* and Global's *The Morning Show*

Q&A HOSTED BY

Ed Skwarek

Vice President of Legal and Regulatory Affairs, Advocis

12:35 PM TO 1:35 PM

LUNCH BREAK

1:35 PM TO 2:35 PM

GUEST SPEAKER

Rod Burylo CIM, FSCI

Associate Portfolio Manager, Business Development Manager, Western Canada, Croft Financial Group

Q&A HOSTED BY

Robyn Mendelson

Vice President, Legal and Procurement, Fidelity Investments

2:35 PM TO 2:55 PM

COFFEE BREAK

2:55 PM TO 3:55 PM

THE IMPACT OF CHANGING DEMOGRAPHICS ON FINANCIAL ADVICE

MODERATOR

Sam Febbraro

President and CEO, Counsel Portfolio Services

SESSION PANELISTS

Rick Hancox

CEO, Financial and Consumer Services Commission of New Brunswick

Shannon Lee Simmons CFP, CIM

Founder, New School of Business

Kevin Wark LL.B, CLU, TEP

Managing Partner, Integrated Estate Solutions, and Tax Advisor, Conference for Advanced Life Underwriting

3:55 PM TO 4:00 PM

CLOSING REMARKS BY

Abe Toews CFP, CLU, CH.F.C.

Chair, Advocis National Board of Directors

4:00 PM TO 6:00 PM

COCKTAIL RECEPTION