PMAC National Conference

"Opportunities & Insights"

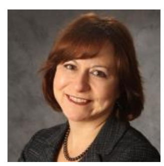
Wednesday, November 13, 2019
Fairmont Royal York, Toronto

8:30 am - 9:00 am **Registration & Breakfast, Exhibitors' Area Opens**

Sponsored by:

Investor & Treasury Services

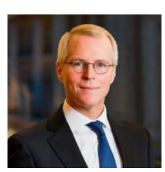
9:00 am **Welcome & Opening Remarks**



Zachary Curry, President & Portfolio Manager, Davis-Rea Ltd. & PMAC Conference Committee Chair
Katie Walmsley, President, Portfolio Management Association of Canada

9:05 am - 10:15 am **Opening Keynote – Geopolitical Risks**

Charles Myers, Chairman, Signum Global, will discuss his predictions on the geopolitical environment and risks facing asset managers. Charles will address the implications of the Trump Presidency on foreign trade, the global debt crisis, big-tech regulation and more. As a senior member of the Finance Committees on the 2008 and 2012 Obama Presidential campaigns as well as the 2016 Hillary Clinton for President campaign, Charles brings a singular perspective to these interconnected issues.



Charles Myers, Founder & Chairman, Signum Global

10:15 am - 10:45 am **Networking Break & Exhibit Viewing**

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10:45 am - 12:00 pm	**Market & Economic Forecast**

Given the recent Canadian and upcoming U.S. elections, we have invited two engaging speakers to provide insight on the forces at work in the Canadian, American and global economies. They will highlight the implications and considerations that should be top of mind for investors in these unpredictable times.


Eric Lascelles, Chief Economist, RBC Global Asset Management
Lesley Marks, Chief Investment Strategist, BMO Private Wealth

12:00 pm – 12:45 pm	**Lunch**

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12:45 pm – 2:00 pm	**Luncheon Keynote - David MacNaughton**

David MacNaughton is the former Canadian Ambassador to the United States, having recently completed his tenure in August 2019. David will reflect on his experiences in office, including the transition from the Obama to the Trump Presidency and the on-going NAFTA/USMCA trade negotiations. He will also offer his thoughts on the current relationship between Canada and the United States, and his outlook going forward.

David MacNaughton, former Canadian Ambassador to the United States

2:00 pm - 2:30 pm	**Networking Break & Exhibit Viewing**

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2:30 pm – 3:30 pm	**Breakout Sessions - *Choice between A. or B.***
A.	**Hot Topics for Private Client Firms**

What are the strategic and operational challenges confronting private client firms today and in the near future? This panel will discuss client communication, client aging and transitioning, ESG, technology, data security, growth and other emerging issues firms are facing. Panelists will share their expertise on how firms can creatively optimize client satisfaction and performance when resources are limited.




Moderator:

Denys Calvin, Principal & Chief Operating Officer, Nexus Investment Management

Panelists:

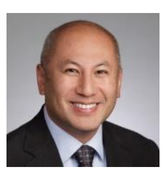
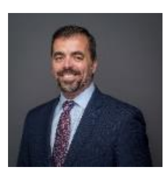
Susan Bell, Executive Vice President, Bell Kearns & Associates

Emily Burt, Executive Vice President, Cardinal Capital Management

Robert McDonald, Chief Operating Officer, Chief Compliance Officer, Baskin Wealth Management

B.	**Developing the Consultant Distribution Channel – Best Practices to Grow and Retain Institutional Business**

How can institutional asset managers further develop their firm's distribution channel? What do consultants really want? How can private client firms enter the institutional space? This lively panel of consultants will discuss best practice considerations and future trends for institutional businesses. Topics covered will include: managing consultant meetings, competing with the rapidly growing OCIO model, ESG, changing client expectations, pricing and tactics to achieve firm growth and success.

Moderator:

Amanda Tepper, CEO, Chestnut Advisory Group

Panelists:

Mark Chow, Partner, Canadian Head of Manager Research, Aon Hewitt Investment Consulting

Gord Lewis, Senior Vice President, Proteus

3:30 pm – 3:45 pm **Networking Break & Exhibit Viewing**

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3:45 pm – 4:55 pm **Industry Leaders Roundtable**

Join seasoned industry leaders who will provide their perspectives on leading successful investment firms through good times and bad. Panelists will discuss and debate lessons learned from growing their businesses, navigating turbulent market cycles, managing talent growth, evolving client expectations and overcoming obstacles. The session will conclude with an audience Q&A session.




Moderator:

Tom Bradley, President and Co-Founder, Steadyhand Investment Funds

Panelists:

Tony Gage, Former Chair of the Board of Phillips, Hager and North (PH&N) Investment Management

Peter Letko, Founder, Senior Vice-President & Senior Portfolio Manager, Letko Brosseau

Richard Rooney, President & Chief Investment Officer, Burgundy Asset Management

4:55 pm Concluding Remarks

5:00 pm **Cocktail Reception**

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