

Montreal Regulatory & Compliance Forum

Thursday September 25



8:00 AM – 9:00 AM

Registration and Sponsor Plenary Welcome

9:00 AM

Welcome

Co-Hosts:



Sarah Balazic
Trans-Canada Capital
Senior Compliance Analyst



Samuel Singler
Kerr Financial Group
Compliance Manager

9:15 AM – 10:30 AM

Emerging Issues

In an era of rapid economic shifts and regulatory evolution, senior leaders from management, investment, legal, and compliance come together to examine the most pressing challenges facing the industry today, including shifting geopolitical dynamics, regulatory and technological change, and their impact on investment strategies.

Moderator



Claudia Gourde
Pinestone Asset Management
General Counsel | COO



Olivier Brosseau
Letko Brosseau
Portfolio Manager | Partner



Christopher Schmück
Fiera Capital Private Wealth
Portfolio Manager and Head of Currency
and Liquidity Management

10:30 AM – 10:45 AM

Break and Sponsor Booth Viewings

10:45 AM – 12:00 PM

Compliance Hot Topics

Join leading compliance experts and legal counsel as they explore today's key regulatory challenges, offering practical insights, effective strategies, and steps to stay ahead, mitigate risk, and ensure best practices.

Moderator



Elise Renaud
Fasken LLP
Partner



Noah Billick
Renno & Co.
Partner



Geneviève Dubé
Desjardins
Director - Compliance



Catherine Lussier
Cote 100
Chief Compliance Officer

12:00 PM – 1:45 PM Lunch Keynote



Alexandre Bilodeau
Olympian

Alexandre Bilodeau is the first freestyle skier to defend an Olympic Gold Medal successfully. Today, Alexandre Bilodeau is part of a Capital Partners team as an investment advisor. Alexandre Bilodeau is actively involved in evaluating potential acquisitions, the due diligence process, and the follow-up with portfolio companies. Whether he is motivating sales teams or inspiring leaders to manage their teams, Alex's insights and story combine to create a life-changing and memorable experience for attendees with practical insights they can implement in their lives right after the event.

1:45 PM – 2:00 PM Break and Sponsor Booth Viewings

2:00 PM – 3:00 PM AUM/Topic Based Roundtables

3:00 PM – 3:15 PM Break and Sponsor Booth Viewings

3:15 PM – 4:30 PM Regulatory Update

End the day with a candid discussion with senior AMF and OSC regulators on key priorities, recent KYC/KYP findings, future sweeps, AI use, conflicts, and cost reporting. The session will conclude with an audience Q&A.

Moderator



Tania Boulanger
McMillan LLP
Counsel - Securities



Gabriel Chénard
Autorité des marchés financiers
Senior Director



Kat Szybiak
Ontario Securities Commission
Senior Legal Counsel

4:30 PM – 6:30 PM Concluding Remarks & Networking