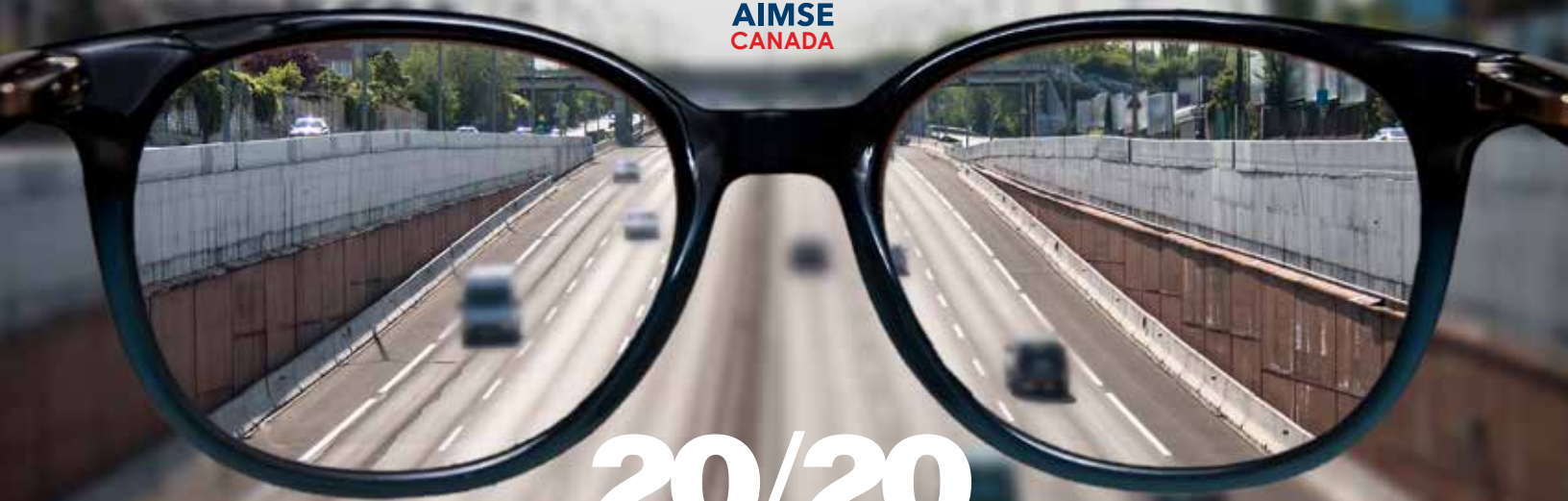




AIMSE  
CANADA



**20/20**  
**VISION**  
A VIEW TO THE  
**ROAD AHEAD**

27th Annual Canadian Conference  
**JANUARY 15–16, 2020**  
Intercontinental Toronto Centre | Toronto, ON

**PRELIMINARY PROGRAM**

**The Association of Investment Management  
Sales Executives (AIMSE)**

WELCOMES YOU TO THE

27th Annual Canadian Conference

**JANUARY 15–16, 2020**

Intercontinental Toronto Centre | Toronto, ON



**AIMSE  
CANADA**

For almost 3 decades, AIMSE has been providing investment management sales and service executives:

**Access to Allocators and Consultants**

**Professional Development Tools Designed to Increase Your Success**

**Knowledge and Education**

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On Wednesday, January 15, we invite you to join us for an evening welcome reception at the Intercontinental Toronto where you can kick off the conference by networking with industry peers in a relaxed and informal setting.

On Thursday, January 16, our full-day conference begins. We will kick off the day with an insightful keynote address by **Fiona Rawle, PhD**, who will specifically explore unconscious bias from the perspective of a finance professional, as well as the perspective of the client. Other conference sessions include a discussion about solvency issues that pension plans are facing, an off-the-record discussion with key consultants, and the ever-popular allocator roundtables. Also, do not miss the opportunity to hear from **Rachel Volynsky**, Mercer Canada's new CIO, who will discuss her new role and her views on asset allocation and portfolio construction.

**Registration is available on the AIMSE website.**

I look forward to seeing you in Toronto!

Sincerely,

**Kimberley Woolverton, CFA**

President, AIMSE Canada & Conference Chair

Executive Vice President, Head of Distribution, Foyston, Gordon & Payne Inc.



PRELIMINARY AGENDA

WEDNESDAY JANUARY 15, 2020

5:30 pm – 8:30 pm Opening Cocktail Reception

THURSDAY JANUARY 16, 2020

7:30 am – 8:00 am Networking Breakfast with Exhibitors

8:00 am – 8:10 am **Welcome & Introduction**

**Kimberley Woolverton, CFA**

President | AIMSE Canada & Conference Chair

Executive Vice President, Head of Distribution, Foyston, Gordon & Payne Inc.

8:10 am – 8:30 am **Now a Word from Our Sponsors**

8:30 am – 9:30 am **Keynote Address by Fiona Rawle, PhD**

***Unconscious Bias in Finance: Evidence, Challenges and Strategies***

This session will introduce the phenomenon of unconscious bias and explore how to recognize and overcome this bias. Going beyond anecdote, we will examine data and evidence for bias and investigate proven strategies for overcoming bias. To do so, we will draw on examples from diverse fields, including finance, medicine, science, academia, and music. For finance, we will specifically explore unconscious bias from the perspective of a finance professional, as well as the perspective of the client.

9:40 am – 10:15 am **Low Interest Rates, Increasing Life Expectancy, Changes to Solvency/Regulations—What does it mean for Pension Plans and Insurers?**

This session will look at the economic, demographic and regulatory impact on pension plans and by extension insurance companies. Will recent changes to solvency funding requirements stem the tide of pension plan closures? Or will the trend of private sector plans shifting the risk to insurers continue? How could these trends impact on investment choices by pension plans and insurers.

Moderator: **Eric Bonnor**

Senior Vice President | Private Funds, Canada, Brookfield Asset Management

Speaker: **Paul Forestell, FSA, FCIA**

President and Chief Executive Officer | Brookfield Annuity Company

10:15 am – 10:45 am Refreshment Break with Sponsors & Exhibitors

*\*Speakers listed are confirmed to date and subject to change.*



PRELIMINARY AGENDA

THURSDAY JANUARY 16, 2020 *(continued)*

10:45 am – 11:30 am **Meet Mercer Canada CIO, Rachel Volynsky**

**Rachel Volynsky**, Mercer Canada's recently appointed CIO responsible for their outsourced chief investment officer team in Canada, will speak about her new role and responsibilities, including her views on asset allocation and portfolio construction.

Moderator: **Kimberley Woolverton, CFA**  
President | AIMSE Canada & Conference Chair  
Executive Vice President, Head of Distribution, Foyston, Gordon & Payne Inc.

Speaker: **Rachel Volynsky**  
Chief Investment Officer | Delegated Solutions, Mercer

11:40 am – 12:00 pm **eVestment's Institutional Trends Insights**

eVestment's Global Head of Insights, John Molesphini, will share how institutional assets are moving across the world, what asset classes are receiving the most interest from institutional investors and consultants, and will finish by touching on Canadian market trends.

Moderator: **Brad Haughey, CFA**  
Director of Global Equities | Black Creek Investment Management Inc.

Speaker: **John Molesphini**  
Global Head of Insight | eVestment

12:00 pm – 1:00 pm **Networking Lunch with Exhibitors**

*\*Speakers listed are confirmed to date and subject to change.*



PRELIMINARY AGENDA

THURSDAY JANUARY 16, 2020 *(continued)*

1:00 pm – 2:30 pm **Allocator Roundtables**

Don't miss this opportunity to meet top capital allocators in Canada in an intimate roundtable setting. Ask them the questions you have always wanted answered and learn more about how to interact with them to meet their needs. Each allocator will be joining you at your table for an open discussion about their roles, their organization, and what they are doing. You will learn what it takes to get your firm positioned for future success, and best of all, no hassles from hustling from one meeting to the next, whether by planes, trains or automobiles.

Moderator: **Joyce Hum, CFA**  
Director | Consultant Relations, BMO Global Asset Management

- Speakers: **Arijit Banik**  
Interim Treasurer | York University Endowment Fund
- Ryan Bradley, MBA**  
Investment Officer | Province of Prince Edward Island
- Michael Dodd, CPA, CGA, CFP**  
Director, Pensions Treasury and Shareholder Services | The Co-Operators Group Limited
- Darin Eddy, CFA**  
Director | Public Markets, HRM Pension Plan
- David Kaposi**  
Chief Investment Officer | Ontario Power Generation Inc.
- Jeff Norton, LLM, CFA**  
President & CEO, Chief Investment Officer | Teacher's Retirement Allowance Fund
- Blair Richards, BA, MBA**  
CEO | Halifax Port ILA/HEA
- Jill Taylor Smith, CFA**  
Senior Manager, Pension Investment Management | TD Bank Group

2:30 pm – 3:00 pm **Refreshment Break with Sponsors & Exhibitors**

*\*Speakers listed are confirmed to date and subject to change.*



PRELIMINARY AGENDA

THURSDAY JANUARY 16, 2020 *(continued)*

3:00 pm – 4:00 pm **Consultant's Panel-Off the Record**

Come and meet key consultants and ask those questions you've been wanting to ask to help you succeed with these influential firms. Always a popular conference session, you will have access to top consultants who will identify key themes, discuss search activity, client priorities and how best to work with their research and field consultants. Come prepared with all of your pressing questions!

Moderator: **Sherry Lee Gregory, MBA**  
Vice President | Consultant Relations, Franklin Templeton Investments

Speakers: **Jason Campbell**  
Principal | Investment Consulting, Eckler

**Brian Cyr, CFA**  
Managing Director | bfinance

**Jillian Kennedy**  
Partner, Wealth | Mercer

*Additional speakers coming soon!*

4:00 pm **Closing Remarks**



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GENERAL INFORMATION



<b>REGISTRATION FEES</b>		
<i>Remittance accepted <b>ONLY</b> in US currency (<b>USD</b>).</i>		
	<b>EARLY BIRD</b> UNTIL DECEMBER 13, 2019	<b>REGULAR</b> AFTER DECEMBER 13, 2019
AIMSE Member	<b>\$ 995</b>	<b>\$ 1145</b>
Two OR More AIMSE Members Attending from the Same Firm	<b>\$ 845</b> <i>per person</i>	<b>\$ 945</b> <i>per person</i>

**Who Can Attend**

**ONLY current, paid AIMSE members** are eligible to attend the Canadian Conference. Please contact the AIMSE office if you are unsure of your membership status or to request a membership application. Executive recruiters, consultants and members of the “working press” are not eligible for AIMSE membership and are therefore ineligible to attend the Canadian Conference.

**Deadlines**

- › Early Bird Registration | **December 13, 2019**
- › Registration deadline for inclusion in printed attendee list | **December 20, 2019**
- › Cancellation/Refund Request | **January 6, 2020**

**Cheque Payments:**

Please print a copy of your registration form and include it with your cheque made payable to AIMSE. Send to the following address:

**AIMSE**  
**11130 Sunrise Valley Drive | Suite 350**  
**Reston, VA 20191**

**Registration Fees EARLY BIRD**

Contributions or gifts to AIMSE are not deductible as charitable contributions for federal income tax purposes. However, dues payments are deductible by members as an ordinary and necessary business expense.

**For clarification on registration policies, please call the AIMSE office at:**

**703.234.4098**





## GENERAL INFORMATION (CONTINUED)

### Refunds/Cancellations

Refunds will be granted by AIMSE for requests received in writing by January 6, 2020. An administrative fee of \$250 will be assessed to all refunds. No refunds will be granted after January 6, 2020 but another AIMSE member from your firm may attend in your place. All requests for registration refunds and/or transfers must be made in writing to [info@aimse.org](mailto:info@aimse.org) and come from the registered member.

### Attendee List

AIMSE does not distribute attendee lists prior to the conference. Conference participants will receive a printed list of attendees within their on-site registration materials. A final, electronic list will be provided post-conference. Your conference registration must be received by December 20, 2019 to be included in the printed material.

### Photography Policy

From time to time, AIMSE may use photographs and video taken during its meetings and events in marketing, social media posts, and other promotional outlets. By virtue of your attendance, you agree to use of your likeness in such media.

### Private Party Policy

Hosted parties in which attendance is restricted to either verbal or written invitations are not permitted at any AIMSE Conference.

### Room Delivery Policy

Only exhibiting companies are permitted to conduct deliveries of promotional materials to AIMSE Conference attendees' rooms.

### Recommended Dress

All sessions and events are business casual.

### AIMSE Media Policy

AIMSE does not issue media passes to any AIMSE conferences or events. All media representatives must be current Associate members and pay the conference registration fee. All attendees must read and adhere to the AIMSE media policy. Exhibitor representatives must sign the Policy Agreement Form.

### Exhibitor/Sponsor Registration

Please refer to the **Sponsor & Exhibitor Prospectus** for specific policies. All individuals attending the conference as exhibitors must submit registration forms and fees together. The Exhibitor Fee allows each exhibiting company to send two individuals to attend the conference and participate in all activities. Additional exhibit staff members who wish to attend the conference must be current AIMSE members and pay the applicable registration fee as outlined in the prospectus.

#### FOR FURTHER INFORMATION CONTACT:

AIMSE

11130 Sunrise Valley Drive, Suite 350  
Reston, VA 20191

Phone: 703.234.4098 | Fax: 703.234.4147

[info@aimse.org](mailto:info@aimse.org) [www.aimse.org](http://www.aimse.org)





GENERAL INFORMATION (CONTINUED)



**Hotel Information**

Intercontinental Toronto Centre  
225 Front Street West  
Toronto, ON M5V 2X3

**Hotel Reservations**

A block of rooms has been reserved for conference participants at the special rate of **\$289 CAD** *per night* for a single room.

To reserve a room, **CALL** the Intercontinental Toronto Centre directly at:  
**1.800.235.4670**

Individuals **MUST** state that they are with the AIMSE 2020 Canadian Conference to receive the group rate.

To reserve a room online, please visit:  
**<https://book.passkey.com/go/AIMSE2020>**

The hotel reservation cut-off date is:  
**December 23, 2019**

# 27th Annual Canadian Conference



## REGISTRATION FORM

Complete information below as you wish it to appear in AIMSE promotional materials

FIRST NAME	LAST NAME	BADGE NAME (NICKNAME)		
JOB TITLE	FIRM			
MAILING ADDRESS				
CITY	STATE	ZIP CODE	COUNTRY	
PHONE	EMAIL			

The personal information ("personal data") you provide on this form is being collected with your consent, for the exclusive purpose of permitting AIMSE to facilitate your registration for the 2020 Canadian Conference and to contact and bill you in connection with that event and/or your AIMSE membership status. The personal data is subject to the terms of AIMSE's privacy policy (<https://www.aimse.org/privacypolicy.cfm>). A party located in the European Union or European Economic Area wishing to exercise rights under the General Data Protection Regulation (GDPR) with respect to such personal data should contact [privacy@aimse.org](mailto:privacy@aimse.org).

### Conference Registration Fee

#### AIMSE Member

- \$ 995 USD (UNTIL DECEMBER 13) \$ \_\_\_\_\_
- \$ 1145 USD (AFTER DECEMBER 13) \$ \_\_\_\_\_

#### Two OR more AIMSE Members attending from the same firm

- \$ 845 USD per person (UNTIL DECEMBER 13)  
\$ 845 X \_\_\_\_\_ (number of people) = \$ \_\_\_\_\_
- \$ 945 USD per person (AFTER DECEMBER 13)  
\$ 945 X \_\_\_\_\_ (number of people) = \$ \_\_\_\_\_

### Membership Dues

Please only submit dues ONLY if you are NOT already a current member. Only current members are eligible to attend. If you are unsure of your membership status, please call the AIMSE office at **703.234.4098**.

- ACTIVE: \$ 350 USD \$ \_\_\_\_\_
- ASSOCIATE: \$ 450 USD \$ \_\_\_\_\_

**TOTAL DUE:** \$ \_\_\_\_\_

#### AIMSE

11130 Sunrise Valley Drive | Suite 350 | Reston, Virginia 20191  
703-234-4098 | [info@aimse.org](mailto:info@aimse.org) | [www.aimse.org](http://www.aimse.org)

**Please return completed form to Caitlin McAuslin who will be in touch regarding payment.**

#### SEND FORM VIA:

**EMAIL:** [cmcauslin@virtualinc.com](mailto:cmcauslin@virtualinc.com)

**FAX:** 703.234.4147

**NOTE:** If you are going to register by FAX and paying by credit card, please DO NOT send a hard copy to the office.



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# SAVE THE DATES

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**AIMSE 43rd  
Annual Marketing & Sales Conference  
MAY 3–5, 2020**

Boca Raton Resort & Club | Boca Raton, FL



**AIMSE 2020 Fall Conference  
OCTOBER 13-14, 2020**

The Chicago Athletic Association | Chicago, IL



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