



22nd Annual AIMSE **Canadian Conference**

January 21-22, 2015

Intercontinental Toronto Centre | Toronto, Ontario

Preliminary Program



Welcome

The Association of Investment Management Sales Executives (AIMSE) welcomes you to the 22nd Annual Canadian Conference!

For over 20 years, AIMSE has been providing investment management sales and service executives:

- Access to plan sponsors and consultants
- Education related to industry developments
- Professional development insights designed to make you more successful

On Wednesday, January 21st, we invite you to join us for a welcome reception at the InterContinental Toronto Centre where you can interact with industry peers in a relaxed and informal setting.

On Thursday, January 22nd, our full-day conference begins. This year's sessions include a keynote address by Jim Gray on how to speak as a leader, a panel discussion to discover where the opportunities are in the leading Canadian banks, an industry update from Greenwich Associates, a conversation with leading consultants in the industry, and the popular roundtable discussions with plan sponsors. In addition, Michelle Cederberg, Health and Productivity Expert, will speak over lunch about helping us to find better life balance and improving our productivity. The conference agenda and registration information is available on the AIMSE website at www.aimse.org

I look forward to seeing you in Toronto!

Sincerely,

Kimberley Woolverton, CFA
Aberdeen Asset Management Inc.
Conference Chair

January 21

5:30–8:00 pm **Opening Cocktail Reception**
Intercontinental Toronto Centre

January 22

7:30–8:00 am **Breakfast**

8:00–8:15 am **Welcome & Introduction**

AIMSE Canada President

Kimberley Woolverton, CFA
Senior Business Development Manager
Aberdeen Asset Management Inc.

8:15–8:30 am **Now a Word from Our Sponsors**

8:30–9:30 am **Keynote Presentation by Jim Gray**
**How Leaders Speak: Essential Rules for Engaging
and Inspiring Others**

Description:

Senior executives, professionals, politicians, entrepreneurs and educators are increasingly being evaluated by how well they speak – how credibly, how naturally and how enthusiastically.

In today’s communication-saturated age, the ability to address others effectively has become the essential mark of a leader. In this keynote presentation, Jim Gray, the author of *How Leaders Speak*, reveals the five keys that leaders employ – preparation, certainty, passion, engagement and commitment – to engage and inspire their audiences.

Integrating video clips of great (and not so great) speeches from the past and present, he demonstrates the elements required to communicate with confidence and authority.

NOTE: Speakers listed are confirmed to date and subject to change

Schedule

9:30–10:30 am

Canadian Banks: Where are the Opportunities?

Description:

The wealth management industry in Canada is dominated by the Canadian banks, which control approximately 90% of all assets invested in Canadian brokerage accounts. The top six Canadian Banks also control the bulk of the \$1.1 trillion Canadian mutual fund industry. This incredibly large pool of investable capital is highly concentrated and poses particular challenges to investment management firms seeking to secure sub-advisory mandates or expand their fund distribution opportunities. Each panelist from a major Canadian Bank is an industry veteran, having worked in a variety of fields from fund distribution, to product development, to broker-dealer platforms. They will share their insights into current product demands from their customers, provide advice about the challenges we face as marketers in navigating their organizations, and highlight areas of future opportunities.

Moderator:

Angela Vidakovich, CIM
Director, Marketing & Client Service
Brookfield Asset Management

Speakers:

Edward Jackson
Managing Director Capital Markets, Corporate Finance
RBC Financial Group

Neil Macdonald, CFA
Managing Director & Head
Scotia Asset Management

Roland Sakha
Senior Manager, Investment Product Management
National Bank of Canada

Willo Watson, CFA, FCSI
Portfolio Manager, Head of Portfolio Management Advisory Group
BMO Nesbitt Burns

10:30–11:00 am

Refreshment Break with Sponsors

NOTE: Speakers listed are confirmed to date and subject to change

Schedule

11:00–12:30 pm

Plan Sponsor Roundtable

Description:

Don't miss this rare opportunity to meet top pension plan sponsors in an intimate roundtable setting. Ask them the questions you have always wanted answered and learn more about how to gain access to them and meet their needs. Each plan sponsor will be joining you at your table for an open discussion of who they are 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:

Tasleem Jamal, CFA
Vice President, Marketing & Client Services
Sprucegrove Investment Management Ltd.

Speakers:

Ryan Bradley
Investment Officer
PEI Provincial Government Department of Finance,
Energy & Municipal Affairs

Paul Fahey, CFA
Vice President, Pension Investments
NAV Canada

Cheryl Janzen
Director, Pension & Retirement Plans-Canada
Cargill Limited

David Kaposi
Chief Investment Officer
Ontario Power Generation

Denise Kehler
President & Chief Executive Officer, Chief Investment Officer
Teachers' Retirement Allowances Fund

continued...



NOTE: Speakers listed are confirmed to date and subject to change

Schedule

Plan Sponsor Roundtable *continued*

Colyn Lowenberger
Director, Pensions & Disability Administration
Regina Pensions & Disability

Alison McKay
Chief Executive Officer
Saskatchewan Health Employees' Pension Plan

Donald Stevens, CFA, CMA
Vice President & Treasurer
Farm Credit Canada

Terri Troy, CFA
Chief Executive Officer
HRM Pension Plan

Sheng Tseng, FSA, FCIA, CFA
Head of Pension & Insurance Investment Management
TD Bank



NOTE: Speakers listed are confirmed to date and subject to change

Schedule

12:30 –2:15 pm

**Luncheon with Guest Speaker Michelle Cederberg,
Health and Productivity Expert**
Exposing the Myth of Life Balance

Description:

75% of Canadians don't believe that work-life balance is possible. We're working more than ever, spending less time with our friends and family, and inevitably watching our health and happiness drift away. So maybe life balance isn't possible?

Michelle Cederberg is pushing back against the common definitions of life balance and challenges you to consider a new view. In this thought-provoking session you will:

- Get clear on key life areas that impact balance and fulfillment and why you need to nurture each.
- Identify your biggest time wasters and effectively prioritize your day to move toward better balance.
- Find out why multitasking hinders productivity, and learn ways to focus and get the job done.
- Commit to physical health as a foundation for personal and professional growth, and learn why it's essential for life balance.

Michelle uses humour and expertise to cut to the chase with ideas and insights that help even the busiest people live an energetic, more balanced life.



Schedule

2:15–3:00 pm

Canadian Institutional Market Trends Update with Greenwich Associates

Description:

Greenwich Associates, a research-based consulting firm providing competitive insights to asset managers, will provide us with an update on the key trends in the Canadian institutional marketplace based on their extensive research with the largest tax-exempt funds in the country. Gain insight into issues affecting plan sponsors today and learn which investment strategies are expected to experience allocations in the future so that you can better focus your product development and marketing efforts.

Moderator:

Kimberley Woolverton, CFA
Senior Business Development Manager
Aberdeen Asset Management Inc.

Speaker:

Davis Walmsley
Vice President
Greenwich Associates

3:00–3:30 pm

Refreshment Break with Sponsors



Schedule

3:30–4:30 pm

Conversations with Consultants – Off the Record

Description:

This interactive session is one of the most popular of the conference. Come and ask your questions to these influential and key consultants in an open forum. Learn what the consultants are speaking to their clients about, what asset classes are in demand, how to best communicate with the consultants, and any new developments within their organizations. Come prepared to face these leading consultants with your candid questions, the ones you've always wanted to ask to best position your firm for success.

Moderator:

Joyce Hum, CFA
Vice President, Consultant Relations
Guardian Capital LP

Speakers:

Philip Falls, CFA, ICD.D
Practice Leader, Investment & Senior Investment Consultant
PBI Actuarial Consultants Ltd.

Jaqui Parchment, CFA
Partner & Head of Investments, Canada
Mercer

Brad Rowe, CFA
Principal
Eckler Ltd.

Brian White, CFA
Partner
Aon Hewitt

4:30 pm

Conference Adjourns





General Information

22nd Annual AIMSE Canadian Conference

January 21–22, 2015 | Intercontinental Toronto Centre | Toronto, Ontario

Registration Information

Deadlines:

Registration Deadline for inclusion in attendee registration list is:

December 15, 2014

Cancellation Refund Request

December 15, 2014

All Exhibitors Must Pre-Register.

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

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

12100 Sunset Hills Road
Suite 130
Reston, VA 20190

Registration Fees

The registration fee is **\$895** (US Dollars) per participant

Group registration fee is **\$745** (US Dollars) Per participant

Two or more participants from the same firm

Hotel Reservations: A block of rooms has been reserved for conference participants at the special rate of **\$249** CAD per night for a single room.

To reserve a room, call the Intercontinental Toronto Centre directly at:

(416) 597-1400

To reserve your room online, visit:

<https://resweb.passkey.com/go/2015aimse>

Individuals MUST state that they are with the 2015 AIMSE Annual Canadian Conference to receive the group rate.

The hotel reservation cut-off date is:

December 29, 2014

Attendee List: Your registration must be received by **December 15, 2014** for your name to be included in the printed list of attendees. Attendee registration lists will not be distributed prior to the conference.

Refund Policy: Refunds will be granted by AIMSE for requests in writing received by **December 15, 2014**. No refunds will be granted after **December 15, 2014** but another AIMSE Member or Associate Member from your firm may be substituted for your registration. An administrative fee of **\$250** will be assessed to all refunds.

Please note that you must be a member of AIMSE in order to attend this conference.

22nd Annual AIMSE Canadian Conference

REGISTRATION FORM

January 21–22, 2015 | Intercontinental Toronto Centre | Toronto, Ontario



Full Name: _____

Title: _____

Badge Name: _____

Firm: _____

Mailing Address: _____

City: _____ State: _____

ZIP/PC: _____ Country: _____

Phone: _____ Fax: _____

E-mail: _____

Payment Information

Conference Fees

(Remittance accepted ONLY in US Currency)

Registration Fee

\$895 USD (Current AIMSE Member)

\$745 USD per participant for two or more individuals from same firm
(Current AIMSE Member)

Membership Dues*

Active Member Dues **\$350 USD**

Associate Member Dues **\$450 USD**

Total Amount Due \$ _____

Payment Method

Cheque (made payable to AIMSE)

MAIL TO: AIMSE

12100 Sunset Hills Road Suite 130 Reston, VA 20190

Credit Card

MC

Visa

American Express

Card Number

CSC

Exp Date

Signature

*Please 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.

NOTE: If you are registering by fax and paying by credit card, please **DO NOT** also send a hard copy to the AIMSE office.