



23rd ANNUAL AIMSE **CANADIAN** CONFERENCE

January 20-21, 2016 | Intercontinental Toronto Centre | Toronto, Ontario

PRELIMINARY PROGRAM



Welcome

The Association of Investment Management Sales Executives (AIMSE) welcomes you to the 23rd 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 20th, 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 21st, our full-day conference begins. This year's sessions include panel discussions focused on Canadian insurance companies, DC investment trends and alternative investment marketing, an industry update from Greenwich Associates, and conversation with leading consultants and plan sponsors in the industry. The conference agenda and registration information is available on the [AIMSE website](#).

I look forward to seeing you in Toronto!

Sincerely,

Kimberley Woolverton, CFA
Aberdeen Asset Management Inc.
Conference Chair

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

JANUARY 20, 2016

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

JANUARY 21, 2016

7:30 am–8:00 am **Breakfast**

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

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

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

8:30 am–9:30 am **Keynote Presentation by Brian Thwaites: *Train Your Brain***

This provocative and enlightening presentation will give that three-pound organ inside your head an adjustment you'll never forget. It's a memorable and entertaining performance that demonstrates how learning to use your brain better will significantly enhance the way you think, learn and communicate. And it will have an immediate and powerful impact on just about everything you do – both personally and professionally!

9:30 am–10:30 am **Alternative Investment Marketing: Know Your Strategies/Know Your Market**

The Canadian institutional market has been a leader in the adoption of alternative asset classes such as real estate, private equity and hedge funds to name a few. This session will initially summarize the Canadian institutional client base and its implementation of alternatives relative to their global peers. In conjunction with a few leading institutional investors in the ongoing implementation of alternative strategies, we will explore how best to present your strategy relative to current and future market dynamics in a modern asset allocation paradigm.

Moderator

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

Speakers

Benjamin Abramov
Head of Canadian Private Markets,
Associate Partner
Aon Hewitt

Kevin Fahey, CFA
Director, Investments
CAAT Pension Plan

Don LeFresne, CFA
Senior Research Analyst, Alternatives
RBC Global Asset Management

David Long
Senior Vice President & Chief Investment
Officer, ALM, Derivatives & Fixed Income
Healthcare of Ontario Pension Plan

Continued on next page...

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

10:30 am – 11:00 am Refreshment Break with Sponsors

11:00 am – 12:30 pm Plan Sponsor Roundtable

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

Marija Finney

Senior Vice President,
Head of Institutional Sales & Service
BMO Global Asset Management

Plan Sponsors

François Dionne

Senior Investments Manager, Equities
*Canada Mortgage and
Housing Corporation*

Tanya Lai, CFA

Managing Director, Public Markets
Ontario Pension Board

Phil Poon

Associate Director,
Investments & Treasury
University of Alberta

Carolyn Tsen, CFA

Manager, Pension Fund
Hydro One Pension Fund

Grace Wong, CFA

Portfolio Manager,
External Portfolios, Pension Fund
Canada Post Corporation

12:30 pm – 1:30 pm Networking Lunch

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

1:30 pm – 2:30 pm

The Canadian Defined Contribution Market – Opportunities & Challenges

The Defined Contribution Pension marketplace in Canada provides pension coverage for over 1,000,000 plan members, and accounts for greater than 15% of all Registered Pension Plan membership. Over 80% of members in defined contribution plans work in the private sector, and the industry is dominated by the Canadian Life Insurance companies. Our esteemed panel of Defined Contribution experts will help us to explore the opportunities and challenges in this growing segment of the Canadian pension market including the following areas:

- Market size, segments & participants
- Investment trends and opportunities, including individual Fund offerings, packaged investment solutions, and the use of Alternatives
- Decumulation and post-retirement strategies

Moderator

Robin Stanton, CFA

Vice President

AGF Investments

Speakers

Alexandra Barbu

Assistant Vice President, Investment Solutions, Group Retirement Services
Sun Life Financial

Jillian Kennedy

Senior Consultant
Mercer

Emmanuel Matte, CFA, FSA, FICA

Senior Managing Director, Global Head, Investment Solutions
Manulife Asset Management

Clark Steffy

Regional Vice President, Sales
Industrial Alliance Insurance and Financial Services Inc.

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

2:30 pm – 3:15 pm **Canadian Institutional Market Trends Update with Greenwich Associates**

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
Principal
Greenwich Associates

3:15 pm – 3:35 pm **Refreshment Break with Sponsors**

3:35 pm – 4:35 pm **Consultants' 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

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

Speakers

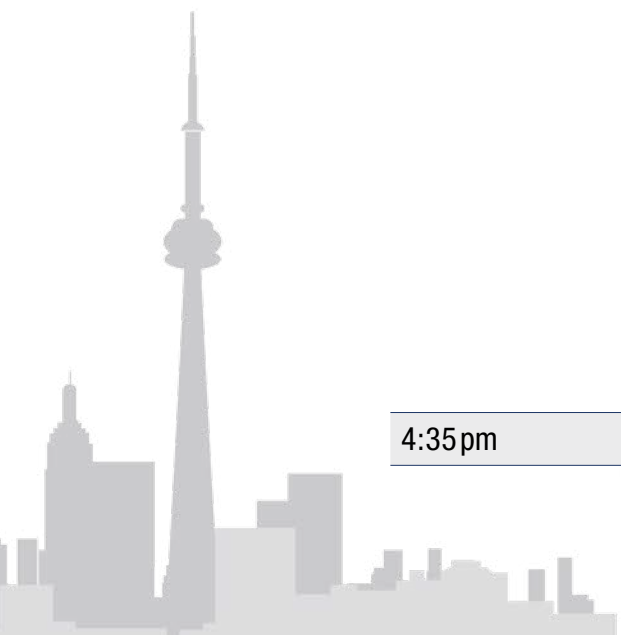
Chris Brisebois
Principal, Investment Consulting
Eckler Ltd.

Jeffrey King
Senior Consultant
Aon Hewitt

Brian Cyr, CFA
Managing Director
bfinance Canada

Todd Nelson, CFA
Toronto Investment Leader
Towers Watson

4:35 pm **Conference Concludes**



General Information

Registration Information

Deadlines:

Deadline to receive early bird registration fee:
December 31, 2015

Registration Deadline for inclusion in printed attendee list:
January 1, 2016

Cancellation Refund Request:
January 10, 2016

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

**Must be a current AIMSE member.
Remittance accepted ONLY in US currency.**

Early Bird (until December 31):

\$895 USD (per AIMSE member)

\$745 USD (per AIMSE member)

two or more individuals attending from the same firm

Regular (after December 31):

\$995 USD (per AIMSE member)

\$795 USD (per AIMSE member)

two or more individuals attending from the same firm

Hotel Reservations: A block of rooms has been reserved for conference participants at the special rate of **\$259 CAD** per night for a single room. To reserve a room, call the Intercontinental Toronto Centre directly at: **1-800-235-4675**. Individuals **MUST** state that they are with the 2016 AIMSE Annual Canadian Conference to receive the group rate.

To reserve a room online, please visit:

<https://resweb.passkey.com/go/AIMSE2016>

The hotel reservation cut-off date is:

December 29, 2015

Attendee List: Your registration must be received by **January 1, 2016** 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 received in writing by **January 10, 2016**. An administrative fee of **\$250** will be assessed to all refunds. No refunds will be granted after **January 10, 2016**, 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.



Registration Form

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

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two or more individuals attending from the same firm

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, Virginia 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.