



# **21st Annual AIMSE **Canadian** Conference**

January 29-30, 2014

Sheraton Centre Toronto Hotel | Toronto, Ontario

Conference Program



**EVESTMENT**  
Making Smart Money Smarter



## Data Driven Insight to Make Smart Money Smarter

- Capital Raising
- Competitive Analysis
- Investor Intelligence and Trends
- Database Marketing and Updates

Differentiate your sales and marketing efforts  
from your peers.

Be a front runner.

# Schedule

## 21st Annual AIMSE **Canadian Conference** | January 29-30, 2014

### January 29

5:30–8:00 pm

#### **Opening Cocktail Reception**

Osgoode Ballroom West

Sponsored by Benefits Canada/  
Canadian Investment Review



### January 30

7:30–8:00 am

#### **Breakfast**

Osgoode Ballroom West

8:00–8:15 am

#### **Welcome & Introduction**

Osgoode Ballroom East

Kimberley Woolverton,  
*President of AIMSE Canada*

8:15–8:30 am

#### **Now a Word from Our Sponsors**

Osgoode Ballroom East

8:30–9:15 am

#### **Delegated Services/Implemented Consulting**

Osgoode Ballroom East

##### **Moderator:**

Joyce Hum, *Guardian Capital Group Limited*

##### **Speakers:**

Yvan Breton, *Mercer*

Paul Malizia, *AON Hewitt*

##### **Description:**

"Delegated Services", "Implemented Consulting", "Discretionary Consulting", "OCIO" are investment delegation models that continue to gain traction amongst institutional investors.

- Are the services defined the same way amongst the many providers?
- Is the delegation trend growing in the Canadian marketplace?
- How does this impact the money managers?

This session will help you navigate the delegation landscape to better understand these consultants' approaches and how to work with them to effectively position your firm.

# Schedule

9:15–10:00 am

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## **Endowments and Foundations: Investment Trends and Innovations**

Osgoode Ballroom East

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**Moderator:**

Jay Wiltshire, *Greystone Managed Investments Inc.*

**Speaker:**

Sara Lyons, *Community Foundations of Canada*

**Description:**

While not as big as in the U.S., the foundation sector in Canada is robust and growing. In the current low interest environment and with growing emphasis on impact, foundations are adapting in a variety of ways. Sara will take us through some of the key trends in foundation investment strategies. Specifically, she will discuss investment screening for social and environmental factors and also impact investing. Secondly, she will present research and a project taking place to allow foundations to maximize their returns and minimize fees by co-investing or pooling investments.

10:00–10:30 am

## **Refreshment Break with Exhibitors**

Osgoode Ballroom West

Sponsored by S&P Dow Jones Indices



# Schedule

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10:30 am–12:00 pm **Plan Sponsor Roundtable**

Osgoode Ballroom East

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**Moderator:**

Tasleem Jamal, *Sprucegrove Investment Management Ltd.*

**Speakers:**

Dominic Blais, *Canadian Medical Protective Association*

Daniel Foster, *United Church of Canada Pension Fund*

Andrew Greene, *OPSEU Pension Trust*

Rosanne Martin, *Maple Leaf Foods*

Yannick Ménard, *BMO Bank of Montreal*

Darryl Orom, *Alberta Teachers' Retirement Fund*

Michelle Peshko, *Glencore Canada*

John Poos, *George Weston Limited & Loblaw Companies Limited*

Scott Taylor, *Canadian Pension Plan Investment Board*

Natasha Trainor, *Government of Newfoundland  
& Labrador Pension Fund*

**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 where 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.

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# Schedule

12:00–1:30 pm

## **Luncheon with Guest Speaker Dr. Mike Mandel, Expert in Communication, Motivation & Influence**

Osgoode Ballroom West

### **Description:**

#### **Brain Software: Words that Change Minds**

Learn the art of influence from a master hypnotist.

Dr. Mike Mandel draws from a quarter century of real-world experience with “words that change minds.” Attendees will gain the ability to influence and persuade others in a wide variety of settings, from presenting to groups to one on one meetings. Content includes:

- Power Language: Subtle words that sway and change behaviour
- Inroads to the unconscious mind
- Rapport: Entering the world of another person
- Techniques to diffuse aggression and frustration
- Accurately determine when you are being lied to
- Gaining the advantage through counter-manipulation
- Seven magic words that put you in control

1:30–2:15 pm

## **Industry Update with Greenwich Associates**

Osgoode Ballroom East

### **Moderator:**

Kimberley Woolverton, *Aberdeen Asset Management*

### **Speaker:**

Andrew McCollum, *Greenwich Associates*

### **Description:**

Greenwich Associates, a leading provider of market information and data for asset managers, will provide us with an update on the trends in the Canadian institutional marketplace based on their extensive research, including surveys of the largest tax-exempt funds in the country. Gain insight into the main issues affecting plan sponsors today and learn what investment strategies they are trending to, so that you can better focus your marketing efforts.

# Schedule

2:15–3:00 pm

## **The 7 Truths of Reaching, Persuading & Influencing People In Financial Services — 2014 Edition**

Osgoode Ballroom East

**Moderator:**

Jamie Hyndman, *Mawer Investment Management Ltd.*

**Speaker:**

Christine Saunders, *H2 Central Marketing & Communications*

**Description:**

Technology and social innovation is driving substantial change in the way we present and communicate with each other. It is particularly challenging in highly regulated industries that involve complex ideas and information. For financial services professionals on the front lines, this challenge can be daunting. This presentation will examine the art and science of good marketing in financial services in an environment where speed, brevity and break-through communications is essential. It will cover:

- The macro issues driving change and influencing the behavior of investors and what's coming next
- The impact of social networks on financial services professionals
- The context of regulation for new marketing techniques
- Specific, practical methods to tune up social network marketing to drive sales

3:00–3:30 pm

## **Refreshment Break with Exhibitors**

Osgoode Ballroom West

Sponsored by Style Research

STYLE  
RESEARCH



# Schedule

3:30–4:15 pm

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## **Marketing in Canada vs. in the U.S.: What You Need to Know**

Osgoode Ballroom East

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**Moderator:**

Paul Buligan, *CI Institutional Asset Management*

**Speaker:**

Stephen Foote, *Northleaf Capital Partners*

**Description:**

There are a lot of differences between Canada and the U.S. besides the weather. As an American asset manager, what do you need to know to be successful in marketing your products North of the 49th parallel? As a Canadian asset manager interested in expanding to the U.S., how do you effectively penetrate a market ten times the size of Canada?

This session will examine elements of market overview, regulation, plan design and who are the gate keepers in the process. We will highlight the issues that most firms struggle with when trying to approach the U.S. and Canadian institutional markets.

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# Schedule

4:15–5:15 pm

## **Traditional versus Alternative Investments: Is the Evaluation Process Different for Research Consultants?**

Osgoode Ballroom East

### **Moderator:**

Angela Vidakovich, *Brookfield Investment Management Inc.*

### **Speakers:**

Ryan Anderson, *Pavilion Advisory Group*

Kathleen Pabla, *Segal Rogerscasey Canada*

David Rogers, *Caledon Capital Management*

Marcus Turner, *Towers Watson*

### **Description:**

This is not going to be the same AIMSE Canada Consultant presentation to ask consultants “anything you want.”

This is going to focus on “what are the different questions” consultants need to answer when evaluating traditional versus alternative strategies? We have representatives from Segal Rogerscasey, Pavilion, Caledon Capital, and Towers Watson. We will explore the traditional versus alternative along the same key considerations: firm pedigree, people, product, philosophy, process and performance.

5:15 pm

**Conference Adjourns**

# Save-the-Date!

## April 27-29, 2014

### 37th Annual Marketing & Sales Conference

**Change | Challenge | Opportunity**



Boca Raton Resort & Club | Boca Raton, Florida

## Luncheon Speaker



### **Dr. Mike Mandel**

*Expert in Communication, Motivation & Influence*

Self-described as “a reasonably normal guy with a really weird job,” Mike Mandel is a uniquely qualified expert in the art and science of influential communication. Simultaneously fascinating and hilarious, he provides audiences with powerful tools to increase intelligence, reduce stress, communicate persuasively.

Mandel’s career has covered many different fields, including trainer, psychotherapist, writer, performer, and musician. In addition to training in neurolinguistic programming, he instructs others in advanced Ericksonian hypnosis for NLP Canada. Widely regarded as one of the world’s premier hypnotists, he holds a doctorate in clinical hypnosis, and is certified in a number of psychotherapeutic disciplines.

Mandel holds 18 nominations and six awards for excellence in entertainment, including the “COCA Hall of Fame Award” (joining the company of entertainers such as Sarah McLachlan, The Tragically Hip, and Jim Carrey).

Mandel appears regularly in the media, such as The Globe and Mail, CBC, YTV, Vision, W5, Discovery, and Bravo, among others.

# Speaker Biographies



## **Ryan Anderson**

*Director, Manager Research*  
Pavilion Advisory Group Ltd.

Mr. Anderson has key oversight responsibilities for Pavilion's manager research function. Together with the Chief Investment Officer, he supervises

Pavilion's dedicated manager research team which conducts approximately 1,000 due diligence meetings with investment managers every year. He also works directly with clients, leveraging his in-depth knowledge of managers and their strategies in a variety of consulting engagements.

Mr. Anderson joined Pavilion in 1996, where he initially focused on growing the firm's proprietary database of investment managers. He subsequently worked as an analyst, helping clients with international and domestic manager structure and search projects. In January 2004, Mr. Anderson relocated to the Boston office where he grew the firm's presence as an investment consultant in the U.S. plan sponsor community. He moved back to Montreal in June 2008 as Head of Research. In addition, Mr. Anderson played a key role developing Pavilion's relationship with investment managers, including developing a business relationship with a Tokyo-based investment management firm serving Japanese financial institutions.

Mr. Anderson holds a Bachelor of Business Administration (Finance) from Bishop's University.



## **Dominic Blais, CMA, CFA, CAIA**

*Senior Portfolio Manager*  
*Public Assets*

Canadian Medical Protective Association

Dominic Blais is a Senior Portfolio Manager, Public Assets for The Canadian Medical

Protective Association (CMPA). In this role he is responsible for the efficient and effective management of all public assets, in accordance with the overall allocations and targets set within the portfolio guidelines. Dominic is involved in most aspects of the portfolio including external and internal management, various research, modeling and recommendations to the Investment Committee. Dominic holds a bachelor of business administration from Bishop's University. He is a CMA and is a CFA and CAIA charterholder.



## **Yvan Breton, ASA**

*Partner and Head of*  
*Fiduciary Management for Canada*  
Mercer

Yvan Breton is a Partner and the Head of fiduciary management for Canada.

In his role Yvan is responsible for developing Mercer's Fiduciary Management business and capabilities in Canada and oversees Mercer's full suite of delegated investment services, such as Implemented Consulting, Mercer's Dynamic De-Risking Solution (MDDS) and single asset class solutions.

Prior to this position, he was Business Leader Investment Consulting for Canada and Latin America. He is a member of the Canadian Investment Leadership Team.

Prior to joining Mercer in 1998, he worked for a large consulting firm for 13 years. He was a Senior Consultant providing actuarial, employee benefit and asset management consulting services to Canadian clients.

Yvan obtained a Bachelor degree of Actuarial Science in 1985 at the Université Laval. He is also an Associate of the Society of Actuaries.



## **Stephen Foote, CFA**

*Global Head of Sales*  
Northleaf Capital Partners

Stephen is responsible for business development activities at Northleaf Capital Partners, working closely with existing and prospective investors and

investment consultants to design, develop and monitor their private markets portfolios. Northleaf is an independent global private equity and infrastructure manager and advisor, with more than \$5 billion in commitments under management on behalf of public, corporate and multi-employer pension plans, university endowments, foundations, financial institutions and family offices. Northleaf's 60-person team, located in Toronto, Canada, London, UK, and Menlo Park, USA, is focused exclusively on sourcing, evaluating and managing private markets investments globally.

Prior to joining Northleaf in 2010, Stephen was an Executive Director at UBS Global Asset Management where he was responsible for marketing a global product

# Speaker Biographies

platform to institutional investors, including both traditional and alternative asset class offerings and services. Previously, Stephen was Vice President, Global Head of Marketing, at Northwater Capital Management Inc., where he headed the firm's marketing, sales and client services activities globally with a focus on alternative investment solutions. Stephen began his career as a consultant at Mercer where he was responsible for delivering a broad range of investment consulting services to pension plans.

Stephen received a B.A. (Honours) from York University and holds the Chartered Financial Analyst designation.



## **Daniel Foster, CPA, CA**

*Investment Manager*

United Church of Canada Pension Fund

As the Investment Manager for the Pension Plan of the United Church of Canada Dan is the primary interface between external investment

managers, custodians, Investment Committee and the plan sponsor. The assets of the pension fund are externally managed and represent a relatively conservative mix of bonds, equities and alternatives. Dan is a Chartered Professional Accountant, a member the Pension Investment Association of Canada and a commerce graduate of the University of Toronto.



## **Andrew Greene, CIM**

*Director*

*Public Market Investments*

OPSEU Pension Trust

Andrew Greene, CIM, is Director, Public Market Investments at the OPSEU Pension Trust, a \$15 billion public pension plan. His main areas of responsibilities are portfolio structuring, asset allocation and researching and monitoring external public market managers and investments. Prior to joining OPTrust in 2009, he was a Vice President at Northern Trust Global Advisors (NTGA). His main area of responsibility was researching external managers and as co-portfolio manager of the Diversified Fund of Canada, NT's multi-manager funds. Before joining NTGA in 2006, Mr. Greene was with the University of Wisconsin Foundation where he was Associate

Director of Investments and was responsible for the management and oversight of over U.S. \$2.5 billion in assets. While at UWF, he had primary responsibility for asset allocation, equities, fixed income and absolute return strategies. Earlier in his career, Andy also worked at Watson Wyatt and Smith Barney. He holds a Masters in Applied Economics (Binghamton University), a Bachelors in Economics (Ithaca College), the Canadian Investment Manager Designation, is a member of the CFA Institute, CFA Society of Toronto and the Pension Investment Association of Canada (PIAC) where he serves as a member of the Investment Practices Committee.



## **Sara Lyons**

*Director*

*Strategic Initiatives*

Community Foundations of Canada

Sara Lyons is Director, Strategic Initiatives for Community Foundations of Canada (CFC). In this role, Sara's

focus is on driving CFC's strategy, partnership and program development across a range of key areas of focus such as youth, Aboriginal reconciliation, and impact investing. Sara's work is to tackle complexity to innovate, connect, clarify and create.

In the area of investing, Sara is currently leading an effort to understand and advance co-investing opportunities for community foundations. She is also the co-author of the Impact Investing Learning Hub, in partnership with the MaRS Centre for Impact Investing and the J.W. McConnell Family Foundation.

Prior to joining Community Foundations of Canada in 2007, Sara worked for the Toronto Community Foundation (TCF) as a program officer, managing their granting programs and working closely with community organizations and granting committees. Before joining the philanthropic sector, Sara worked as managing coordinator for the Toronto City Summit Alliance, a coalition of community and business leaders committed to advancing the prosperity and liveability of the Toronto region, with a focus on areas like affordable housing, the integration of newcomers and economic development.

She is currently a Board member of the Circle on Philanthropy and Aboriginal Peoples in Canada and the U.S.-based Community Indicators Consortium.



## Paul Malizia, MBA, CFA

Partner

Canadian Investment Consulting  
AON Hewitt

Paul was appointed Partner in July 2006. He has been a senior investment consultant in AON Hewitt's Toronto office since 2004 and has 20 years of industry experience. He is the defined benefit group leader within the Investment Consulting Practice and is also a member of the Practice's Canadian leadership team. Paul served as Canadian Investment Consulting Practice Leader for Hewitt Associates from 2006 until 2010. He has extensive consulting experience in the areas of corporate pension plans, foundations, endowments, university, public sector and multi-employer pension plans and is called upon frequently to assist them in establishing their strategic direction and framework.

Prior to joining AON Hewitt, Paul worked as Assistant Vice President of Investment Management Services for a large insurance company in Toronto. He also spent five years with an investment consulting firm in Toronto, where he served as Director of Manager Research for Canada.

His educational background includes a Bachelor of Science degree in Mathematics and Actuarial Science from the University of Toronto and a Master of Business Administration degree in Corporate and Investment Finance from the Schulich School of Business at York University in Toronto. Paul was awarded the Chartered Financial Analyst designation in 2003 and is a member of the CFA Institute, CFA Society Toronto, the Association for Canadian Pension Management (ACPM) and The International Foundation of Employee Benefit Plans.



## Rosanne Martin

Director of Finance, Pensions  
Maple Leaf Foods

Rosanne Martin is the Director of Finance, Pensions, at Maple Leaf Foods Inc. She is a 25-year veteran of the capital markets, with positions ranging from asset/liability management at J.P. Morgan early in her career, to starting up a foreign currency investment trading desk for the Bank of New Zealand (in New Zealand), to her current position at Maple Leaf Foods,

where she oversees the financial risk management of the pension plans and plays a key role on the MLF Pension Investment Management Committee. She earned her MBA in Finance from the Schulich School of Business in mid-career. Rosanne is an avid supporter of many charities and enjoys painting (pictures, not her house!), cooking, reading and last but not least, playing with her Portuguese Waterdog, Pedro.



## Andrew McCollum

Principal  
Greenwich Associates

Andrew is a Principal based in the firm's Stamford, CT office. He is responsible for managing relationships with a number of leading asset managers, investment consultants, and other service providers in the United States and Canada. With over 15 years of consulting to the asset management industry, Andrew has experience advising clients on a variety of distribution, marketing, and product issues. He has recently led advisory engagements on global growth assessments, entering the institutional market, brand equity analyses, product positioning and messaging, thought leadership program design and execution, and private equity fund raising. He has also authored studies on opportunities and threats in the Outsourced CIO market, trends in the ETF marketplace, and developments in the defined contribution market. In addition, Andrew oversees the firm's work with institutional investors in North America and the subscription-based information service, Greenwich Access for Asset Managers. Andrew frequently delivers keynote presentations at industry conferences and is often quoted in mainstream and industry publications.

Before joining Greenwich in 2009, Andrew was a Managing Director at Chatham Partners where he was responsible for managing the company's research and consulting relationships with asset managers and defined contribution recordkeepers. Prior to that, he worked in the Financial Services and Corporate Strategy Practices at CEB (Corporate Executive Board) advising firms on strategy development, strategic planning, M&A, and competitive intelligence, among other topics. Andrew received his BA in Political Science from Cornell University and his MBA from the Kellogg School at Northwestern University.

# Speaker Biographies



## **Yannick Ménard**

*Director  
Pension Investments  
BMO Bank of Montreal*

Yannick Ménard is the Director, Pension Investments for BMO Bank of Montreal. Yannick is responsible for the management of the Bank's \$5 billion Canadian defined benefit pension plan, including the development, implementation and oversight of the plan's investment strategy. He joined BMO in September 2011 and has more than 20 years of industry experience.

Prior to joining BMO, Yannick spent ten years with the Ontario Municipal Employees Retirement System (OMERS) where over time he was responsible for the plan's external manager program, hedge fund investments and risk management for OMERS Capital Markets. Previously, Yannick spent close to ten years in pension and investment consulting where he assisted companies with the management of their pension plans and the investment of their pension and corporate assets.

Yannick received his BSc in Actuarial Mathematics from the University of Montréal. He is a Chartered Financial Analyst (CFA) and a member of the Toronto CFA Society. Yannick is also a Fellow of the Society of Actuaries (FSA) and of the Canadian Institute of Actuaries (FCIA).

## **Darryl Orom**

*Senior Fixed Income Analyst  
Alberta Teachers' Retirement Fund*

Darryl Orom is responsible for the selection and oversight of ATRF's external public market portfolios. Mr. Orom also participates in formulating investment strategy, and determining the ATRF's asset allocation. He joined ATRF in 2007 as a Portfolio Analyst and holds a Bachelor of Commerce, Degree from the University of Alberta.



## **Kathleen Pabla, CFA**

*Vice President  
Segal Rogerscasey Canada*

Ms. Pabla is a Vice President and Director of Research in Segal Rogerscasey's Toronto office. She has over 20 years of experience in the Canadian investment business. Ms. Pabla's expertise includes investment research, investment product design, and investment consulting. She works with a diverse clientele including defined contribution (DC) pension plans, private counsel operations and wealth management programs for major financial institutions. Ms. Pabla also has experience in banking, mutual fund operations, and asset and financial management firms.

Prior to joining Segal Rogerscasey, Ms. Pabla was Director of Investment Research and Analysis in Investment Management Services for Manulife Financial in Toronto. Her responsibilities included providing research and oversight of investments for pension platform (DC plans) services. Prior to that, Ms. Pabla was the Director of Investment Management Services at CIBC Asset Management, Inc.

Ms. Pabla has a BA from the University of Alberta. She holds the Chartered Financial Analyst (CFA) designation and is registered as a Portfolio Manager across Canada.



## **Michelle Peshko, MBA, CFA**

*Glencore Canada*

Michelle Peshko is responsible for recommendation and the implementation of investment strategies for Glencore Canada's open and closed defined benefit pension plans (\$2.5B) and multiple capital accumulation plans (\$0.4B).

Michelle joined Noranda a predecessor company, in 1999 following her involvement in a start-up investment management firm. Prior to that she spent four years in Towers Perrin's investment consulting practice.

Michelle is an active member of the Pension Investment Association of Canada (PIAC) as a Director on its Board and a member of the Investment Practices Committee, recently championing the creation of its DC-subcommittee. She is a member of FSCO's investment advisory committee. Michelle earned her Chartered Financial Analyst (CFA) designation, and her MBA from the Schulich School of Business after completing her Commerce degree at the University of Toronto.

Michelle is a mother of three, an avid spinning and volleyball enthusiast, co-owner of a boutique fitness studio in Toronto ([www.rpmtotalfitness.ca](http://www.rpmtotalfitness.ca)), and repeat Ride to Conquer Cancer participant/supporter.



### **John Poos**

*Vice President*  
*Pensions & Benefits*  
George Weston Limited & Loblaw  
Companies Limited

John is Vice President, Pensions and Benefits for George Weston Limited and Loblaw Companies Limited. He was formerly Executive Director of OMERS Sponsors Corporation and prior to joining OMERS, John was Director, Global Pensions at Nortel Networks. John majored in economics at York University and has a Law Degree from Queen's University. He was called to the bar in 1984 and is a member of the Law Society of Upper Canada. He is also a member of the Subcommittee on Investment Performance (SCIP) for York University, and sits on the editorial board of Benefits and Pensions Monitor.



### **David Rogers, CA, CBV**

*Partner*  
Caledon Capital Management

David Rogers is the founding Partner of Caledon Capital Management, an independent Private Markets portfolio management firm based in Toronto, Canada. Caledon provides North American institutional investors with customized infrastructure and private equity investment solutions targeting both global Fund commitments and direct investments.

Prior to Caledon, David was the team leader and SVP of the OMERS private equity group. David and his team were responsible for sourcing, structuring, and negotiating investments into global private equity Funds and direct co-investments.

Prior to OMERS, David was a Vice President, Investments with a Canadian venture capital firm and prior to that, Vice President, Finance and CFO of FirstService Corporation, a TSX and NASDAQ-listed public company.



### **Christine Saunders**

*President*  
H2 Central Marketing  
& Communications

H2 Central Marketing & Communications  
President Christine Saunders offers expert knowledge in the emerging

digital landscape and recognized insights into the application of new technologies to informing and persuading behavioural change among end-users.

An experienced speaker on interactive marketing and the practical business-oriented application of social media, Saunders most recently presented on "Implementation Challenges and Social Media Toolkit" during the IIAC Social Media Conference at the Toronto Board of Trade. She has received awards for integrated and interactive marketing for non-profit, municipal, financial services and other knowledge-based businesses and organizations. Saunders has specific, demonstrated expertise in web accessibility and how to effectively promote via online and mobile platforms.

Responsible over the course of her career for all key facets of marketing, including product development, channel management, advertising and social engagement, she offers audiences a unique vision of the future of interactive marketing based on 14 years of direct experience. That vision includes the conviction that marketing and digital marketing are rapidly merging, creating a new and more effective synthesis of capabilities that has broad implications for organizational effectiveness and management.



# Speaker Biographies

Saunders is an experienced speaker and lecturer with a BA from University of King's College, Halifax and two Master's degrees – one in philosophy from the University of Edinburgh and a second in political theory from the University of Glasgow. Saunders also served Part-Time Faculty, University of Guelph-Humber, teaching fourth-year courses in Ecommerce, Leadership, and Strategy. Before joining H2 Central, she held progressively more senior level roles with CIBC, Certapay Inc. Communicopia Inc. and TD Bank Financial Group, focusing on various aspects of large scale product development and project delivery projects with a distinct web-based foundation.



## **Scott Taylor**

*Senior Portfolio Manager*  
Canada Pension Plan Investment Board

Mr. Taylor is a Senior Portfolio Manager with CPP Investment Board and is responsible for managing a global portfolio of fund relationships within the External Portfolio Management (EPM) team.

Previously, Mr. Taylor worked at Level 3 Communications as a member of the European Corporate Development Team in addition to working with BMO Nesbitt Burns as a member of the Mergers and Acquisitions Team.

Mr. Taylor received a Masters in Finance degree from London Business School and a BBA from Wilfrid Laurier University.



## **Natasha Trainor, CFA**

*Manager of Pension Investments*  
Government of Newfoundland  
& Labrador Pension Fund

Natasha is the Manager of Pension Investments in the Department of Finance for the Government of Newfoundland and Labrador. In this role she is responsible for managing \$7 billion in defined benefit pension plan assets. Originally from Toronto, Natasha is a CFA charterholder, holds a Bachelor of Applied Science degree in chemical engineering from Queen's University and an MBA from the Richard Ivey School of Business at the University of Western Ontario. Prior to moving to St. John's in 2009, Natasha spent several years working in investment management as a Canadian equity analyst.



## **Marcus Turner, CFA, FRM**

*Senior Consultant, Toronto*  
Towers Watson

Marcus Turner joined Towers Watson seven years ago and is a Senior Consultant in the investment consulting group. Prior to joining Towers Marcus worked for over 12 years in the Investment group of a large financial institution. Among other accomplishments, he was responsible for setting up and running the institution's proprietary trading desk and managed a group of professionals charged with developing alternative investment strategies.

As a Senior Investment Consultant, Marcus consults on a wide variety of asset issues including asset allocation, manager structure, and manager selection. He is a former member of Towers Watson's Infrastructure and Currency Research Committees with responsibility for assessing currency and infrastructure managers as well as trends and developments in these asset opportunities. Marcus is a regular speaker at industry conferences. Most recently he spoke to the CFA Society Toronto on managing extreme risks in pension funds. Marcus is a CFA charterholder and a member of the Global Association of Risk Professionals.



# AIMSE Canadian Board Members



## **Kimberley Woolverton, CFA**

*Conference Chair*

*Senior Business Development Manager  
Canada*

*Aberdeen Asset Management*

Kimberley Woolverton joined Aberdeen Asset Management in 2009 and is responsible for business development and client servicing for Aberdeen's Canadian clients. Prior to joining Aberdeen, Kim spent almost 5 years at Burgundy Asset Management where she was responsible for business development and client servicing. She also spent over 3 years with Merrill Lynch in Denver, Colorado as a Special Services Financial Planner, prior to returning to Toronto. Kimberley earned her BSc (Distinction) degree from McGill University, completed her Canadian Securities Course (Honours) in 1995 and became a CFA® Charterholder in 2004. She has also completed numerous Executive Education programs including those through the Harvard Kennedy School, the Rotman School of Management and Columbia Business School. She is a member of the CFA® Institute and is currently President of the Association for Investment Management Sales Executives (AIMSE) Canada and serves on the U.S. Board of Directors of AIMSE.



## **Paul Buligan, CFA**

*Vice President*

*CI Institutional Asset Management*

Mr. Buligan is responsible for institutional business development within the pension, endowment and foundation market in Ontario and Western Canada. He has over 19 years experience in the Canadian financial services industry covering, investment consulting and account administration. Paul earned the Chartered Financial Analyst designation in 2007 and is a member of the Toronto CFA Society. Mr. Buligan is a board member of Moorelands Community Services, a not-for-profit organization helping Toronto's children and youth affected by poverty.

# AIMSE Canadian Board Members



## **Joyce Hum, MBA, CFA**

*Vice President  
Consultant Relations  
Guardian Capital Group Limited*

Joyce joined Guardian Capital LP in 2010 to establish and actively service relationships with consulting firms within the North American consulting community. She started her career in consulting at Towers Perrin in the asset consulting practice assisting clients with their pension, endowment and foundation investment needs. Prior to joining Guardian, Joyce was Vice President, Consultant Relations with State Street Global Advisors. Joyce graduated from The University of Toronto in 1990 with a Bachelor of Commerce, has her MBA from York University, Schulich School of Business (1994), and her CFA designation (1999). Joyce is also an active board member for the Canadian Association of Investment Management Sales Executives (AIMSE) and a member of the CFA Institute.



## **Jamie Hyndman, CFA**

*Director of Strategic Business Development  
Mawer Investment Management Ltd.*

Jamie Hyndman is Director of Strategic Business Development at Mawer Investment Management Ltd., which he joined in 2005. He is responsible for marketing, product development and asset growth. He coordinates the continued expansion of the Firm's assets under management. Mr. Hyndman is on the Board of Directors and also serves on the Firm's Management Committee which is responsible for the execution of the Firm's strategic plan.

Mr. Hyndman has investment experience since 1996. Prior to joining Mawer, he was a Vice President and Portfolio Manager for Franklin Templeton Investment Corporation from 1998 to 2004. Previously, he was an Investment Representative for TD Waterhouse Investor

Services, which he joined in 1996. Before moving to Calgary, Mr. Hyndman was a Commercial Real Estate Investment Analyst for Prudential Portfolio Managers in Toronto from 1994 to 1996. From 1992 until 1994, he was a Commercial Real Estate Analyst for Royal LePage Commercial Real Estate Services in Toronto.

Mr. Hyndman earned his Bachelor of Arts degree with Honours from the University of Western Ontario, has completed a number of courses through the Canadian Securities Institute, and is a Chartered Financial Analyst charterholder.

Mr. Hyndman currently serves on the Board of Directors for the Canadian arm of the Association of Investment Management Sales Executives (AIMSE) and is a member of Toastmasters International, the CFA Institute, and the Calgary CFA Society.



## **Tasleem Jamal, MBA, CFA**

*Vice President  
Marketing & Client Services  
Sprucegrove Investment  
Management Ltd.*

Ms. Jamal began her career in the financial services industry in 1998, as an Investment Analyst with Ernst & Young Investment Advisory Services Inc. She was promoted to Vice President in 2000, a role in which she provided investment consulting services to high net-worth individuals, foundations and endowments clients in addition to managing the performance reporting team of analysts. Subsequently in 2003, Ms. Jamal joined the Canadian Investment Consulting arm of Hewitt Associates in Toronto and spent several years as a Pension Consultant where she assisted a variety of multi-national plan sponsors with their decision making with respect to their pension plans.

Ms. Jamal joined Burgundy Asset Management in January 2007 to focus on client relationship management and business development for Burgundy's Canadian institutional clients. In July 2010, Ms. Jamal was appointed Vice President of the firm.

Ms. Jamal joined Sprucegrove in August 2010. In her first year with the firm, she focused on investment research and was a part of the investment research team. In September 2011, Ms. Jamal assumed the role of Vice President, Marketing and Client Services with responsibilities for client relationship management and new business development of Sprucegrove's Canadian clients.

Ms. Jamal earned two undergraduate degrees, a Bachelor of Commerce and a Bachelor of Arts majoring in Psychology, from McMaster University in 1996. She subsequently received her MBA with a major in Finance in 1999 from Michael G. DeGroote School of Business. She was awarded the Chartered Financial Analyst designation in 2003. Ms. Jamal has also studied in the Executive Education programs of the Harvard Business School, Columbia University Graduate School of Business and the CFA Institute.

Ms. Jamal is an active board member for the Canadian Association of Investment Management Sales Executives (AIMSE) and is also a member of the Toronto CFA Society and the CFA Institute.



**Jay Wiltshire, CFA**

*Vice President  
Business Development*  
Greystone Managed Investments Inc.

Jay Wiltshire is Vice President, Business Development of Greystone Managed Investments Inc.

Before joining Greystone, Jay was Vice President, Business Development with State Street Global Advisors; here his main focus was developing, communicating and executing a customized strategic sales plan to drive direct sales of investment management solutions and services. Previously, he worked for Capital Guardian Trust Company, as Vice President and Relationship Manager, where he was responsible for developing sophisticated institutional client relationships in Canada. Jay also worked as Vice President, Institutional Investment Services at Franklin Templeton Institutional and as an Investment Consultant at Mercer Investment Consultants.

Jay's professional credentials include a Bachelor of Commerce, at the University of Toronto, and a CFA charterholder.

Jay is a Member of the Canadian Pension and Benefit Institute, the Association of Canadian Pension Managers and the Toronto CFA Society. He is based in Greystone's Toronto office.



**Angela Vidakovich**

*Director  
Marketing & Client Service*  
Brookfield Investment Management Inc.

Ms. Vidakovich is responsible for marketing and client service for the Canadian institutional investment market. She has over 22 years of experience in the institutional market in Canada covering investment management, back-office investment services and commercial real estate. Ms. Vidakovich has a Bachelor of Arts degree in Commerce and Economics from the University of Toronto and she holds the Canadian Investment Manager designation (CIM).

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