



22nd Annual AIMSE **Canadian Conference**

January 21-22, 2015

Intercontinental Toronto Centre | Toronto, Ontario

Conference Program

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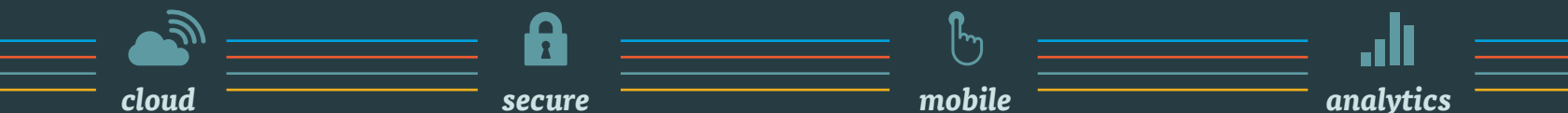




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CE Qualified
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22nd Annual AIMSE **Canadian** Conference

January 21-22, 2015

Intercontinental Toronto Centre | Toronto, Ontario

Conference Program

Wednesday, January 21

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

Thursday, January 22

7:30–8:00 am **Breakfast**
 Ballroom A Sponsored by FactSet Canada



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

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**
 Ballroom B

8:30–9:30 am **Keynote Presentation by Jim Gray**
 Ballroom B **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.



Schedule

9:30–10:30 am
Ballroom B

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 Investment Management Inc.

Speakers:

Edward Jackson
Managing Director, Global Investment Banking & Co-Head,
Investment Funds
RBC Capital Markets

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
Ballroom A

Refreshment Break with Sponsors

Sponsored by S&P Dow Jones Indices



Schedule

11:00–12:30 pm
Ballroom B

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, Treasury Board
Secretariat
Government of PEI, Canada

Paul Fahey, CFA
Vice President, Pension Investments
NAV Canada

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

David Kaposi, CFA
Chief Investment Officer
Ontario Power Generation Inc.

continued...



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



Schedule

12:30 –2:15 pm
Ontario/Niagara Room

**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.

Moderator:

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



Schedule

2:15–3:00 pm
Ballroom B

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
Ballroom A

Refreshment Break with Sponsors

Sponsored by Style Research



Schedule

3:30–4:30 pm
Ballroom B

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



Featured Speakers



Jim Gray

Senior Communications Advisor

Jim Gray is a senior communications advisor, based in Toronto.

A former journalist with The Toronto Star and the Canadian Broadcasting Corporation, he serves organizations at the executive level, developing strategy, managing issues, and providing expert presentation, media and crisis skills coaching.

Jim has extensive experience in the preparation and execution of crisis communication protocols, and provides counsel on crisis response across all sectors. He believes that a crisis can represent a powerful communications opportunity – if an organization’s leadership responds by conveying timely, accurate information with empathy.

Jim speaks frequently on communication issues. The author of *How Leaders Speak*, he’s writing his next book, *The Young Leader*.



Michelle Cederberg

Health & Productivity Expert

Michelle Cederberg galvanizes people to blaze their own path and live a bigger life. An author, health expert, and life coach, she transports delighted audiences on a journey to optimal health and energy habits, to find better work-life balance, and to gain momentum toward the personal legacy they long to create.

Michelle is the author of three books, including her latest, *Energy Now! Small Steps to an Energetic Life*, where she shares her philosophy in an eye-opening and practical way, with methods that make a difference.

She holds a Masters in Kinesiology, a BA in Psychology, a specialization in Health and Exercise Psychology, is a Certified Exercise Physiologist and a Certified Professional Co-Active Life Coach.

Speaker Biographies



Ryan Bradley

*Investment Officer, Treasury Board Secretariat
Government of PEI, Canada*

As the Investment Officer for the Province of Prince Edward Island, Ryan is the primary interface between external investment managers, custodians, Investment Advisory Committee, Investment Consultant and the plan sponsor. The assets of the pension fund are externally managed and represent a relatively conservative mix of bonds, equities and alternatives Investments. Ryan has his Masters degree in Business from the University of Prince Edward Island and is a member the Pension Investment Association of Canada.



Paul Fahey, CFA

*Vice President, Pension Investments
NAV Canada*

Mr. Fahey has been NAV CANADA's Vice President, Pension Investments since September 2010. In this role, he is responsible for designing and executing the investment strategy and controlling the risk associated with NAV CANADA's defined benefit pension plans.

Prior to joining NAV CANADA, Mr. Fahey was a founder and managing partner with Aurion Capital Management, an independent Toronto based institutional investment counseling

firm. In this role he was responsible for all aspects of fixed income portfolio management for Aurion's institutional clients. He was also a member of Aurion's senior team responsible for strategic direction and firm management. Prior to joining Aurion in 1994, Mr. Fahey was the Vice President, Fixed Income at Barclays McConnell, a Toronto based institutional investment manager.

Mr. Fahey holds a Bachelor of Commerce degree from McGill University and a Masters of Business Administration degree from Concordia University. He also is a Chartered Financial Analyst charterholder. He has served as a member of the executive committee of the Toronto CFA Society and the CFA Institute's Presidents Council.



Philip Falls, CFA, ICD.D

*Practice Leader, Investment & Senior
Investment Consultant
PBI Actuarial Consultants Ltd.*

Philip Falls is a Senior Investment Consultant with over 30 years of pension and investment industry experience. Prior to joining PBI, he was Head of Investments for several Canadian corporations and trusts he advised and made investment decisions for public, corporate and multi-employer pension plans as well as for endowment and insurance funds with a variety of customized investment and risk mandates. He has significant experience with both conventional and alternative investment assets classes and the design of investment products and strategies. Philip was twice the recipient of Canada's Top 25 Most Influential Plan Sponsors awards (presented by Benefits Canada magazine) based on leadership, innovation and impact in the investment industry.

Philip is the Leader of the Investment Practice. He is currently consulting to half a dozen pension plans, endowment trusts, and other trust funds across Canada. Philip is responsible for designing and implementing investment and risk management solutions dealing with plan asset and liability issues.

Philip has an MBA in Finance from the University of Western Ontario and holds both the Chartered Financial Analyst (CFA) and the Institute of Corporate Directors (ICD.D) designations. He is currently a part-time finance instructor with the British Columbia Institute of Technology (BCIT).

Edward Jackson

*Managing Director Global Investment Banking & Co-Head,
Investment Funds
RBC Capital Markets*

Edward Jackson is currently Managing Director, Global Investment Banking and Co-Head of the Investment Funds Group, RBC Capital Markets. Mr. Jackson is also President and CEO of Advantage Preferred Share Fund, a proprietary closed end fund listed on the TSX. Mr. Jackson has over 25 years of experience in the financial services sector and currently covers a broad range of asset management clients globally. Mr. Jackson is a Fellow of the Institute of Canadian Bankers and holds an Honours Bachelor of Business Administration from Wilfrid Laurier University.



Cheryl Janzen

*Director, Pension & Retirement Plans-Canada
Cargill Limited*

Cheryl Janzen leads the pension/retirement plans function for Cargill in Canada. Cargill is one of the world's largest privately held corporations, with nearly 70 businesses in more than 65 countries. In Canada, Cargill employs over 8000 and operates 17 businesses in the food, agriculture, industrial and financial (risk management) sectors.

In her current role, Ms. Janzen oversees the management and administration of Cargill's Canadian defined benefit and growing defined contribution assets in Canada, including investment policy, manager selection, vendor selection and management, compliance, operations, retirement policy and strategy.

Cheryl earned an MBA from the University of British Columbia in 1987. A campus recruit, she joined Cargill's Canadian headquarters in Winnipeg as a financial analyst at a time when the

Minneapolis-based company was actively seeking out opportunities to expand its footprint in Canada. In her first roles, Cheryl supported the company's strategic initiatives in capital planning, evaluation of business development opportunities and major investment decisions including green field operations and acquisitions/divestitures. Monitoring the company's pension investments and membership in the company's pension committee were a minor part of her duties early in her career but this exposure sparked an enduring interest in the field.

Cheryl has held a number of different positions at Cargill including finance manager, foreign exchange trader, grain merchant, due diligence lead for several acquisitions, director of Human Resources - Canada, and senior financial consultant with the global Controllers Group. She collaborates closely with Cargill's Global Benefits Manager, Global HR Operations and the US Pension Trust team to deploy the company's global policies.



David Kaposi, CFA

*Chief Investment Officer
Ontario Power Generation Inc.*

David Kaposi joined Ontario Power Generation Inc. (OPG) in 2013 as Chief Investment Officer and leads a team that is responsible for managing OPG's large investment portfolio of public and private assets. OPG's Pension Fund has \$11.5 billion in assets and serves over 22,000 members, making it one of the largest single-employer plans in Canada. Additionally, OPG manages a combined \$14.2 billion in the Nuclear Used Fuel Fund and the Nuclear Decommissioning Fund.

David has been working in the institutional investment industry since 1998 and prior to joining OPG he was a Partner and Global Head of Alternatives at Mercer, where he was a member of the firm's global Alternative Investment Committee. He was also a Partner with Bastion Infrastructure Group, and Director of Manager Research at Hewitt Associates (now AON Hewitt) in Canada.

David is a graduate Victoria College in the University of Toronto and is a CFA Charterholder.

Speaker Biographies



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

Colyn is Director of Pensions & Disability with the City of Regina and Chief Executive Officer to the 5 pension and disability plans administered by Regina Pensions & Disability. Colyn brings nearly 20 years of experience in finance and investments to the Director and CEO roles of the City of Regina and its associated pension and disability plans. Prior to his current roles, he spent 10 years in banking and investment with BMO and CIBC. Colyn holds an MBA from the University of Regina as well as a Masters Certificate in Management and a Bachelor of Science with a double major in Mathematics and Statistics.



Neil Macdonald, CFA
Managing Director & Head
Scotia Asset Management

Neil is Managing Director & Head, Scotia Asset Management, accountable for more than \$46 Billion in mutual fund assets. Neil leads product development domestically & internationally, investment oversight and distribution, including the build out of a national Investment Specialist salesforce.

Scotia Asset Management has been a growth engine within the industry, experiencing a record 70 months (as of October 2014) of consecutive positive net sales and leading in peer group market share gains over the past three years.

Neil joined Scotiabank in 2007 from an independent mutual fund company. He has an MBA from IVEY Business School and is a CFA charter holder.

Neil and Ginny have two teenage girls and he enjoys alpine skiing, cycling and spending time in Georgian Bay. He serves on the board of the Young Peoples Theatre in Toronto.



Alison McKay
Chief Executive Officer
Saskatchewan Health Employees'
Pension Plan

Alison McKay is the Chief Executive Officer for the Saskatchewan Healthcare Employees' Pension Plan (SHEPP). A Certified Management Accountant, she has spent the last 10 years in pension administration; the last 7 with SHEPP. Alison has been a member of SHEPP's senior management team since 2008. Prior to her appointment as CEO in 2014, Alison's previous roles included, Interim CEO, Chief Financial Officer, Director of Finance and Administration and Operations Manager. Before joining SHEPP she held various pension administration and financial management roles with SaskTel and SaskEnergy. Together with her 37 hard-working SHEPP employees, she manages the day-to-day operations of the Plan, working tirelessly to service the Plan's 63 employers and over 52,000 members.



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

Jaqui Parchment is a Partner and Leader of Mercer's Investment business for Canada. She is a member of the Canadian Leadership Team and a member of the North American Investments Leadership Team.

Jaqui has over 25 years of experience in the retirement savings and investment areas. She has considerable expertise in all areas of investment strategy and implementation. She is on the faculty of the School of Pension Investment Management and a frequent speaker at industry conferences

Jaqui rejoined Mercer in 2013, after two years as Executive Director of Sales for a large global money manager. In her prior time at Mercer, Jaqui held a variety of roles including National Director of Consulting and Head of Toronto, Mercer Investments (Advice Segment).

Jaqui earned her Bachelor degree in Mathematics and Actuarial Science at the University of Waterloo in 1987. She is an Associate of the Society of Actuaries and a CFA Charterholder.

Bradley Rowe, CFA

Principal
Eckler Ltd.

Brad is a Principal of Eckler Ltd. and leads the Asset Consulting practice in Atlantic Canada. Based in Halifax, Nova Scotia, he has 17 years of consulting experience.

He has provided advice to Pension, Insurance, Trust, Foundation and Endowment funds with respect to governance, investment planning, policy design, implementation as well as ongoing risk management and performance analytics.

His clients include organizations in both the public and private sectors, encompassing a broad range of innovative strategies and portfolio structures utilizing both public and private markets.

In addition, Brad served on the Board of Directors of the Nova Scotia Teachers Pension Plan Trustee Inc., and is currently a member of the Mount Saint Vincent University Pension Governance Board. He has served as a member of the Board of Directors for the Atlantic Canada Chartered Financial Analyst (CFA) Society and the Atlantic Council of the Association of Canadian Pension Management (ACPM).

Brad has a degree in Economics and from Memorial University of Newfoundland, and pursued graduate studies in Econometrics and Financial Economics at Dalhousie University. Brad also holds the Chartered Financial Analyst (CFA) designation and is currently nearing completion of the MBA program.



Roland Sakha

Senior Manager, Investment Product Management
National Bank of Canada

Roland joined National Bank in 2008 and is responsible for the research, development and management of investment products distributed through National Bank's retail branches, full service dealer (NBF), external bank-owned and independent channels, and Private Wealth 1859. In his current capacity, Roland focuses on enhancing clients' investment experience

and capital growth through investment fund launches, fund wrap construction and risk optimization, and the pursuit of key third party investment management partnerships.

Roland began his career at Standard Life of Canada in 2001, where he held roles in investment product development and in the operations management of mutual funds, segregated funds, annuities and life insurance.

Roland is a graduate of McGill University with an MBA and a Bachelor of Commerce.



Donald Stevens, CFA, CMA

Vice President & Treasurer
Farm Credit Canada

Don has over twenty years of extensive experience in the finance and business, including over sixteen years at a vice president level.

He has been at FCC for 22 years in various capacities including VP of: Finance, IT and Treasury.

In his current role at FCC, Don is responsible for overseeing the management of the FCC's treasury function and pension program. The treasury function includes managing over \$20 billion in debt, and \$1 billion in short term investments. The pension function includes investments of over \$400 million, developing policies, governance, communication programs and researching changes in legislation.

Don has presented to customers across Canada on the markets, economics, banking, and risk management for over a decade and teaches at the University of Regina on banking and financial crisis.

Don is a Chartered Financial Analyst, a Certified Management Accountant and a professional engineer. He holds an MBA from York University and a Bachelor of Engineering from Carleton University.

Speaker Biographies



Terri Troy, CFA
Chief Executive Officer
HRM Pension Plan

Terri Troy is CEO of the HRM Pension Plan, a multi-employer pension plan. Terri is responsible for all aspects of the plan and including governance, risk management, customer service, pension administration, and investments. Prior to this, Terri oversaw the pension investments for Royal Bank of Canada's global pension plans.

Terri is an active participant in the Canadian pension industry and is frequently asked to speak and write on various investment topics. She was recognized by peers with the Leading Pension Plan Sponsor in 2011 and has been recognized in other years as one of the Top 25 Most Influential Plan Sponsors. She is an active member of the Pension Investment Association of Canada having chaired PIAC's Government Relations Committee from 2010-2011, chaired PIAC's Investment Practices Committee from 2005-2009, served on PIAC's Board of Directors from 2004-2009, and chaired the PIAC Board in 2007. She is a member of the Advisory Committee for the Canadian Investment Review, is a member on Advisory Committees for various portfolio investments and is a Director of a UK Energy Company and a Canadian financial services company.



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

Mr. Tseng began his career in the investment industry in 1995, as an Actuarial Analyst in the Investment department of London Life Insurance Company. He then spent 8 years at an actuarial consulting firm, which included work on various investment related projects such as asset liability management and variable annuity hedging.

Mr. Tseng had been in a number of Finance and Investment roles within TD Bank since 2006. In September 2013, he was appointed to a newly created role leading the teams responsible for investment management for TD's pension plans as well as the investment portfolios of TD Insurance.



Davis Walmsley
Vice President
Greenwich Associates

Davis Walmsley consults with investment managers in North America on a variety of distribution, marketing and product opportunities. Davis is currently working on several engagements focused on evaluating client satisfaction, sales effectiveness and brand awareness. Davis has extensive experience advising investment managers. Prior to joining Greenwich Associates, he worked as a Director in Barclays Investment Banking FIG practice where he provided M&A and capital markets advice to asset management clients. He conducted a research study and authored a paper focused on how investment managers build and sustain franchise value. Previously, he helped found the Strategic Advisory Group within Lehman Brothers' Prime Services group, which provided management consulting services to the firm's hedge fund clients. Davis received his BS in Finance and Economics from Lehigh University and his MBA from the Harvard Business School.

Willo Watson, CFA, FCSI

*Portfolio Manager, Head of Portfolio Management
Advisory Group*
BMO Nesbitt Burns

Willo leads a team of professionals who are accountable for ensuring the investment integrity of BMO Nesbitt Burns' managed account programs. She is responsible for the development of these programs to meet the evolving needs of the marketplace as well as contribute to the ongoing strategic management of the firm's managed account programs.

Willo joined BMO Nesbitt Burns in 2010 as the Supervising Portfolio Manager for the Managed Account Program. She has over 20 years' experience in the financial services industry. Prior to joining BMO Nesbitt Burns, Willo was with ScotiaMcLeod for over 17 years, most recently as their Director of Portfolio Management Services where she was responsible for their Advisor Managed Program as well as separately managed accounts, mutual fund wrap program and third party mutual fund research.

Willo is a Registered Portfolio Manager, Certified Financial Analyst (CFA) and a Fellow of the Canadian Securities Institute (FCSI).



Brian White, CFA

Partner
Aon Hewitt

Brian White is a Partner with the Investment Consulting practice of Aon Hewitt. As a senior practitioner, Brian's responsibilities include advising clients on matters related to investment, policy and governance of institutional assets. He also plays a leading role in strategic planning, business development and management within the practice.

Brian's knowledge of investment consulting encompasses the development of investment policies, asset allocation modeling, asset/liability studies, manager review, alternative investments searches and selection, performance measurement, analysis and attribution, plan governance and trustee/custodian search and selection.

Brian has over 25 years of experience in both institutional money management as well as investment consulting. Brian consults to corporations, universities, not-for-profit organizations and multi-employer sponsors on issues relating to investment and risk management, including asset mix policy, manager structure and selection, alternative investments and performance monitoring.

Brian has earned a Chartered Financial Analyst designation from the CFA Institute in Charlottesville, Virginia, a Masters in Business Administration from the Rotman School of Management at the University of Toronto and a Bachelor of Administrative Studies (Hon.) from Trent University. Brian is a frequent speaker at industry conferences and events.

AIMSE Canada Board Members



Kimberley Woolverton, CFA

*President, AIMSE Canada
& 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 US Board of Directors of AIMSE.



Paul Buligan, CFA

*Vice President
CI Institutional Asset Management*

Paul Buligan is a Vice President with CI Institutional Asset Management. Mr. Buligan is responsible for institutional business development and client relations within the pension, endowment and foundation market in Ontario and Western Canada.

Prior to joining CI's institutional team, Paul spent two years as an Investment Consultant at an independently owned actuarial consulting firm working primarily with corporate and multi-employer pension plan sponsors. Previously, Paul worked at Invesco Canada Ltd, in a business development role partnering with investment professionals throughout Ontario. Earlier in his career, Mr. Buligan developed his knowledge of registered products with one of Canada's largest registered account administrators.

Paul is involved in a number of not-for-profit organizations. Paul serves on the board for Moorelands Community Services, a not-for-profit organization helping Toronto's children and youth affected by poverty and as a Canadian board member of the Association of Investment Management Sales Executives. Paul earned the Chartered Financial Analyst designation and is a member of the Toronto CFA Society.



Marija Finney

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

Marija is a seasoned investment professional with over 29 years' experience in the financial services industry. She joined BMO Asset Management Inc. in 2010 and is a member of the firm's senior leadership team, responsible for developing and implementing a strategy to expand their presence with institutional investors in Canada. Over the past two decades, her primary focus was business development and client service where she worked for several large asset management firms including the former Barclays Global Investors Canada Limited, Franklin Templeton Institutional and previously, TD Asset Management. Marija graduated from Queen's University with a Bachelor of Arts degree.



Joyce Hum, CFA

Vice President, Consultant Relations
Guardian Capital LP

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.



Tasleem Jamal, 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.

AIMSE Canada Board Members



Robin Stanton, CFA

Vice President, Investments
Highstreet Asset Management

Robin is Vice President, Investments for AGF Investments Inc. In this role, Robin works closely with AGF and subsidiary investment teams to ensure that their respective investment philosophies, processes, positioning and results are effectively communicated to current and prospective clients and consultants. Robin is also actively involved in consultant relations and business development for AGF Investments, covering select regions and constituencies in both the United States and Canada. Robin has 13 years of industry experience and joined AGF from its subsidiary firm, Highstreet Asset Management.

Robin began his investment career at Manulife Financial as Manager, Investment Management Services. In this role, he conducted investment research and analysis related to the selection and monitoring of investment managers. Robin also served as a senior member of Manulife's Group Retirement Solutions team, where he designed and delivered investment solutions to institutional clients and their advisors. Subsequent to Manulife, Robin joined Hewitt Associates as an Investment Consultant on the Canadian team providing guidance to clients with their investment strategies. Robin's clients included pensions, foundations, endowments and insurance companies.

Robin is a CFA Charterholder, and is a member of both the Toronto CFA Society and CFA Institute. Robin is also a member of the Association of Investment Sales Executives (AIMSE), and serves on the investment committee for the Kitchener-Waterloo Community Foundation (KWCF).



Angela Vidakovich, CIM

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).



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.

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