



23rd ANNUAL AIMSE **CANADIAN** CONFERENCE

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

CONFERENCE PROGRAM



Stay Ahead of the Curve

You need to differentiate from the pack. How can you ensure you don't wipe out?

- Know your competition
- Understand your clients' needs
- Look beyond performance
- Tell your best story

Talk to us about how we can help you succeed. Stop by our booth or catch us during a break.



23rd ANNUAL AIMSE CANADIAN CONFERENCE

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

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CE Approved
Provider



CFA Institute

As a participant in the CFA Institute Approved-Provider Program, AIMSE has determined that this program qualifies for 4 credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE tracking tool.

Schedule of Events

WEDNESDAY JANUARY 20, 2016

5:30 pm–8:00 pm **Opening Cocktail Reception**

Ontario Room Intercontinental Toronto Centre

THURSDAY JANUARY 21, 2016

7:30 am–8:00 am **Breakfast**

Ballroom A *Sponsored by HSBC Global Asset Management:*



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

Ballroom B **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**

Ballroom B

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

Ballroom B 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 **The Canadian Defined Contribution Market – Opportunities & Challenges**

Ballroom B

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.*

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

Ballroom A

Sponsored by S&P Dow Jones Indices:



continued...

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

Ballroom B

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*

Graeme Hay, CMA, CFA

Senior Manager, Strategy & Research, *Teachers' Retirement Allowances Fund*

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

Senior Portfolio Manager, External Portfolios, Pension Fund, *Canada Post Corporation*

12:30 pm–1:30 pm **Networking Lunch**

Ontario/Niagara Room

1:30 pm–2:30 pm **Alternative Investment Marketing: Know Your Strategies/Know Your Market**

Ballroom B

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 Investment 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, CFA

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

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

Ballroom B

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*

continued...

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

Ballroom A

Sponsored by Style Research:



3:35 pm–4:35 pm Consultants' Panel – Off the Record

Ballroom B

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.*

Brian Cyr, CFA

Managing Director, *bfinance Canada*

Jeffrey King

Senior Consultant, *Aon Hewitt*

Todd Nelson, CFA

Toronto Investment Leader, *Towers Watson*

4:35 pm

Conference Concludes

MAY 1-3

39th Annual Marketing
& Sales Conference

*The Ritz-Carlton Orlando,
Grande Lakes
Orlando, Florida*



SAVE THE DATE

2016

AIMSE CONFERENCES



OCT 12-13

AIMSE Fall Conference

*The Princeton Club,
New York, New York*



Callan Associates

Callan's Institutional Consulting Group (ICG) empowers investment management organizations with the research, education and analytical services necessary to succeed in an evolving and extremely competitive environment. Callan assists investment management organizations in three areas:

1. Market Trend Analysis
2. Portfolio Analytics
3. Institutional Investment Education

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Featured Speaker

Brian Thwaits | *Brain Trainer*



Brian Thwaits is a learning whiz who first demonstrated his flair for performance as an award-winning educator. He's now an engaging and entertaining 'brain trainer' who shows people how to enhance their thinking, communication, innovation, and change management skills.

Brian shares fascinating discoveries from the fields of learning theory and neuroscience to suggest – in fun and delightful ways – creative and practical approaches to a host of issues we face both in the workplace and in our personal lives. His presentations capture both the hearts and minds of his audiences – so they leave his sessions with faces smiling and brains percolating.

Brian is the author of *The Big Learn: Smart Ways to Use Your Brain*, which showcases his unique and thought-provoking take on how we should truly use our heads.

Speaker Biographies



Benjamin Abramov

Head of Canadian Private Markets,
Associate Partner
Aon Hewitt

Ben leads the private markets (private equity, real estate, and infrastructure) research function in Canada and is a Senior Consultant. In this role, Ben oversees research of private markets strategies and advises Canadian and other global clients.

Prior to joining Aon Hewitt, Ben was with the University of Toronto Asset Management and held roles with E&Y and Lusight Research. Ben holds an MBA from the Schulich School of Business at York University and an LLB (JD equivalent) from Osgood Hall Law School at York University.



Alexandra Barbu

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

Alexandra leads the team of investment professionals who oversee governance, reporting and research activities in support of Sun Life Financial's Group Retirement Services. Alexandra has over twelve years of pension and investment consulting experience, having provided investment manager research, performance monitoring and consulting services to various defined contribution, defined benefit, endowment and foundation clients.

She is responsible for overseeing relationships with investment managers, bringing investment products to the market, and representing Investment Solutions on

various committees. Overseeing the execution of pension committee investment and education, investment fund selection and on-going monitoring of investment managers and funds are also central to her role.

Alexandra joined Sun Life Financial in March 2009 from the investment consulting practice of a large consulting firm and holds an Honours Bachelor of Business Administration degree from Wilfrid Laurier University with a minor in French.



Chris Brisebois, CFA

Principal, Investment Consulting
Eckler Ltd.

Chris is the Investment Consulting Practice leader in Toronto and has 20 years of broad experience in the pension consulting, investment consulting and investment management fields. Chris has served a wide variety of clients during his career and has special expertise in providing meaningful and practical advice in areas such as asset allocation and investment policy, performance evaluation, modeling, and investment manager selection.

Prior to joining Eckler in 2009, Chris was a vice president at an investment management firm. Chris also spent a number of years with other major actuarial consulting firms, most recently as a senior investment consultant. In this role, Chris was the key investment relationship manager for more than 40 clients, including many of the firm's largest. Chris also sat on the Global Asset Allocation Committee and was responsible for setting the Canadian economic assumptions for asset allocation studies.

Chris graduated from the University of British Columbia in 1994 with Bachelor of Science degree. Chris is a CFA Charterholder (1999) and a Fellow of Society of Actuaries and Canadian Institute of Actuaries (both in 2000).

Speaker Biographies

continued...



Brian Cyr, CFA
 Managing Director
bfinance Canada

Brian oversees the representation of bfinance Canada, a subsidiary of international investment consulting house bfinance International Ltd. Prior to joining bfinance in 2012, Brian was responsible for the relationship management of institutional clients in Eastern Canada for Pyramis Global Advisors, a Fidelity Investments company. Previously, he was Manager, Investment Program, in Standard Life's Group Savings & Retirement division. His responsibilities included the selection and monitoring of asset managers as well as investment counselling to DC and DB pension schemes across Canada. He began his career in 1998 at Caisse de dépôt et placement du Québec (CDP) where he held various analyst roles, notably in Private Placements. Brian earned a BA in Public Communications and a BBA in International Business from Université Laval in Quebec City. He is a CFA charterholder.



François Dionne, CFA
 Senior Investment Manager, Equities
Canada Mortgage and Housing Corporation

François has worked at the Investments and Pension Fund division of the Canada Mortgage and Housing Corporation (CMHC) since 2000. He is currently responsible for managing the Pension Fund's Canadian equity portfolio while overseeing its external equity mandates. He holds a Masters Degree in Economics, an MBA, and is a CFA Charterholder. Mr. Dionne has taught a number of finance courses at the University of Ottawa over the course of the last 15 years.



Kevin Fahey, CFA
 Director, Investments
CAAT Pension Plan

Kevin Fahey is a Director, Investments at the Toronto-based Colleges of Applied Arts and Technology Pension Plan (CAAT), which serves employees and retirees at Ontario's community colleges and certain related employers. Since 2010, Kevin has been responsible for oversight and strategy initiatives associated with CAAT's private equity, infrastructure and real estate investment programs. Prior to joining CAAT, Kevin worked for several years at the employee pension fund of a Canadian bank. He is a CFA charterholder, and holds a Bachelor of Commerce from Queen's University and a Bachelor of Laws from Osgoode Hall Law School at York University.



Graeme Hay, CMA, CFA
 Senior Manager, Strategy & Research
Teachers' Retirement Allowances Fund

Graeme joined TRAF in 2013 and is currently the Senior Manager, Strategy & Research. Graeme is responsible for evolving the plan's overall investment strategy and investment policy framework. Graeme is also the leader of TRAF's public and fixed income program representing approximately \$3.7 billion in assets. Prior to TRAF, he was a member of the investment team of Wellington West Asset Management, the internal portfolio management unit of one of Canada's largest independent brokerages. In this role, he carried out fundamental research for the firm's equity portfolios and participated in asset allocation decisions for the firm's multi-asset class mutual funds. He also led the firm's research effort on external investment managers employed across the firm. He began his investment career as a senior analyst in the asset-liability management unit of Great-West Life where he was involved in managing risk for the company's pension annuity line of

SPEAKER BIOGRAPHIES

business. Graeme is a Certified Management Accountant (CMA), having earned the Robert Syme Memorial Silver Medal and is a Chartered Financial Analyst (CFA) Charterholder. He is the Past President of the CFA Society of Winnipeg and is the Chair of the Manitoba Regional Council of the Pension Investment Association of Canada (PIAC).



Jillian Kennedy

Senior Consultant
Mercer

Jillian is a Principal and Senior Consultant in the Toronto office of Mercer's Investment business. She is responsible for leading the development and execution of Mercer's growth strategy for its Canadian Defined Contribution and Savings Business. She is also a member of the Investments Leadership Team. Jillian's main practice area is the strategic support and management of client relationships with a focus on design, investments and vendor management. Jillian has extensive experience in all aspects of governance to support both the development of a new retirement program, as well as ongoing management of existing retirement programs. Jillian has been with Mercer for over 8 years and in the group retirement industry for over 15. Jillian has spent her entire career in provided services to both plan sponsors and plan members in preparing and saving towards retirement.



Jeffrey King, CFA

Senior Consultant
Aon Hewitt

Jeffrey is a Senior Consultant in Aon Hewitt's Investment Consulting practice, serving the greater prairie region out of the Regina office.

Working with clients ranging from public and private pension plans, public and private foundations, to multi-employer pension plans, Jeffrey has developed a broad

array of experience and expertise. Jeffrey supports clients through strategic planning guidance, investment policy development, asset optimization modeling, asset liability studies, manager reviews, manager searches, transition management projects, and performance monitoring and analysis.

Jeffrey is registered as an associate advising representative and dealing representative (exempt market) with the Securities Division of the Financial and Consumer Affairs Authority of Saskatchewan.

Jeffrey has presented to industry groups, including the Canadian Pension Benefits Institute.

Jeffrey has been with Aon Hewitt for 14 years, joining shortly after the completion of his Bachelor of Administration Degree at the University of Regina. Jeffrey received the Chartered Financial Analyst designation in 2004.



Tanya Lai, CFA

Managing Director, Public Markets
Ontario Pension Board

Tanya Lai is Managing Director, Public Assets at the Ontario Pension Board (OPB). OPB has \$23 billion in assets, and is the administrator of a major defined benefit pension plan sponsored by the Government of Ontario whose membership base is made up of certain employees of the provincial government and its agencies, boards and commissions.

Tanya oversees the Plan's public market assets where her main areas of responsibility are strategy research & implementation, portfolio construction, manager selection & monitoring across equities and fixed income asset classes.

In addition, Tanya is a member of OPB's Asset Mix Committee that actively manages the Plan's aggregate risk exposures. Tanya joined OPB in 2008, leading the Plan's entry into the emerging markets and the development of OPB's investment policies.

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Speaker Biographies

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Prior to joining OPB, Tanya has worked with Canadian-based pensions (both defined benefits & defined contributions plans) and endowments where she oversaw investment research on traditional/alternative asset classes, multi-manager structure design, and led initiatives in the area of risk management. Tanya has a MBA from University of Toronto Rotman School of Management, B.Comm (Honours) from University of Toronto, and is a CFA charter-holder (member of the Toronto CFA Society).



Don LeFresne, CFA

Senior Research Analyst, Alternatives
RBC Global Asset Management

Don is responsible for the due diligence, selection and monitoring of alternative investments and complex asset strategies provided to the discretionary businesses of RBC Wealth Management. This broadly encompasses hedge funds, private equity, real estate and commodity-related investments. Don joined RBC in 1988 and has many years of derivative, risk management and hedge fund experience, having worked in RBC Capital Markets and several of RBC's Wealth Management businesses. Don graduated with a BA in Economics from York University and earned his Chartered Financial Analyst charter in 1998. He is one of the founders, a former co-chair and now member of AIMA Canada's Sales Practices Committee, a key contributor to the Canadian Securities Institute (CSI) Alternative Investment curriculum, and a former Chartered Financial Analyst exam grader.



David Long, CFA

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

David Long is the Senior Vice President & Chief Investment Officer, ALM, Derivatives and Fixed Income, for the Healthcare of Ontario Pension Plan (HOOPP). He is responsible for Asset/Liability modeling and portfolio construction, Derivatives and Fixed Income, and Short Term and Foreign Exchange.

David joined HOOPP in 2001 as a Senior Portfolio Manager and was later promoted to Vice President, Derivatives & Fixed Income. David was appointed Senior Vice President & Chief Investment Officer, ALM, Derivatives and Fixed Income, in 2011. David received his Bachelor of Science in mathematics from Brock University and his Masters of Mathematics and Ph.D. in statistics from the University of Waterloo. David also holds the Chartered Financial Analyst designation.

David has been a key participant in the development of HOOPP's current derivatives portfolio strategy and a leader in establishing our current liability driven investment strategy. David is also a member of the HOOPP Asset Allocation Committee.

Emmanuel Matte, CFA, FSA, FICA



Global Head, Investment Solutions
Manulife Asset Management

Emmanuel Matte, BSc, CFA, FSA, FICA, is the global head of the investment solutions team for Manulife Asset Management. He joined Manulife Asset Management when Standard Life's Canadian operations were acquired by Manulife in January 2015. His team contributes to product innovation and thought leadership activities and is

SPEAKER BIOGRAPHIES

responsible for designing meaningful and innovative client-centered investment solutions, as well as supporting clients with state-of-the-art advisory support in their asset allocation decisions.

Emmanuel sits on the Manulife Asset Management product committee and participates in the global initiative of developing pension risk management solutions and Liability Driven Investment (LDI), including OCIO offerings. In addition, he also manages the team responsible for promoting and supporting our multi-assets products including private market solutions, such as real assets.

He joined Standard Life Investments Inc. in 2009 as a vice-president. Prior to that, Emmanuel worked as an executive director at UBS Global Asset Management. He is a Chartered Financial Analyst charterholder.



Todd Nelson, CFA

Toronto Investment Leader
Towers Watson

Todd Nelson is the Investment Leader and a Senior Consultant in our Toronto office. Prior to joining Towers Watson in 2009, he worked for five years at another major global consulting firm.

Todd has experience with a wide variety of institutional clients, including DB and DC plan sponsors, endowments and foundations. Todd is responsible for assisting plan sponsors on all aspects of managing their investment programs, including establishment of investment policies, selection of recordkeeper and investment options as well investment performance monitoring.

Todd has represented Towers Watson as an expert speaker on capital accumulation plans at external investment seminars.

Todd is a CFA charterholder and has completed the Canadian Securities Course. He received an Honours B.Comm. in economics from the University of Guelph.



Phil Poon

Associate Director,
Investments & Treasury
University of Alberta

Phil Poon is the Associate Director, Investment & Treasury at the University of Alberta. Phil has been with the University since 1990 and worked with the investment committee since its 1997 inception. He oversees the endowment and operating funds. His responsibilities include investment portfolio governance, asset allocation, investment manager selection and monitoring, custodial and corporate banking, and cash management. Phil is a graduate of the University of Alberta's School of Business.



Clark Steffy

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

Clark Steffy has worked in the Pension and Investment field for the past 24 years with a number of prominent financial institutions. Clark has experience in the fields of retirement plan design, record keeping, administration, retirement education, institutional money management and executive retirement plans. Clark regularly speaks at conferences and has written a number of published articles in the field behavioural finance.



Carolyn Tsen, CFA

Manager, Pension Fund
Hydro One Pension Fund

Carolyn Tsen is Head of the External Manager Program at Hydro One Pension Fund in Toronto, Canada where she is responsible for selection, implementation and monitoring of the fund's \$6.5 billion portfolio of public and private market investments. As well, she serves as Secretary of the Pension Management Committee, an advisory body to Hydro One Pension Fund.

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Speaker Biographies

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Ms. Tsen has extensive experience in the investment industry including investment manager research, investment strategy implementation, project management and relationship management with pension committees and senior management. Prior to Hydro One, Carolyn was Director of Research for a leading Private Wealth Management firm with assets over \$2 billion and offices across Canada. She was also a pension investment consultant for many years with one of Canada's premier consulting firms. Carolyn holds a Bachelor of Commerce degree from Ryerson University and is a Chartered Financial Analyst (CFA). She is a member of the CFA Institute and the CFA Society, Toronto.



Davis Walmsley
Principal
Greenwich Associates

Davis Walmsley, Principal, 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.



Grace Wong, CFA
Senior Portfolio Manager,
External Portfolios, Pension Fund
Canada Post Corporation

Grace Wong is Senior Portfolio Manager, External Portfolios, Pension Fund Investments at Canada Post. Grace joined Canada Post Corporation, a Crown corporation, in 2009. Her responsibilities include managing the plan's public markets managers (equity and fixed income), asset allocation and risk management.

Previously Grace worked in the Office of the Public Guardian and Trustee and a family office, which is now part of Scotiabank, researching and monitoring external managers and public market investments. She began her investment career on the fixed income team at institutional investment manager Foyston, Gordon & Payne.

Grace is an active member of the Pension Investment Association of Canada having served on PIAC's Communiqué Committee since 2011 and served as the committee chair from 2012-2013. Grace earned her Bachelor of Science degree from the University of Toronto and her MBA from Queen's University. She is a member of the CFA Institute.

AIMSE Canada Board Members



Kimberley Woolverton, CFA

President, AIMSE Canada and
Conference Chair | Senior Business
Development Manager
Aberdeen Asset Management Inc.

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.



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.

AIMSE Canada Board Members

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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 and 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
AGF Investments

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

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.



Thank You to Our Partners

AIMSE Platinum Corporate Sponsor: eVestment



For more information contact: **Erica Jack**

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eVestment provides a flexible suite of easy-to-use, cloud-based solutions to help the institutional investing community identify and capitalize on global investment trends, better select and monitor investment managers and more successfully enable asset managers to market their funds worldwide. eVestment helps its clients be more strategic, efficient and informed through its leading-edge technology, fantastic client service and by delivering data not only for alternative strategies, but also through the largest, most comprehensive global database of traditional strategies.

The company was founded in 2000 and is headquartered in Atlanta, Georgia with global offices in New York, Toronto, London, Sydney, Hong Kong and Dubai. eVestment acquired PerTrac, a leading provider of robust, hedge fund analysis software and workflow solutions, and Fundspire, an innovative, cloud-based technology provider of hedge fund analytics in November 2012.

AIMSE Silver Corporate Sponsor: Callan

Callan

For more information contact: **Nona Phillips**

120 N. LaSalle Street | Suite 2400 | Chicago, IL 60602 | 312.346.3536 | phillips@callan.com | www.callan.com

Knowledge. Experience. Integrity.

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