



24th ANNUAL AIMSE **CANADIAN CONFERENCE**

January 18-19, 2017

Intercontinental Toronto Centre

Toronto, Ontario

Preliminary Program

EMBRACE CHANGE



24th Annual AIMSE Canadian Conference

Welcome



The Association of Investment Management Sales Executives (AIMSE) welcomes you to the 24th Annual Canadian Conference!

For almost 25 years, AIMSE has been providing investment management sales and service executives:

- › **Access to plan sponsors and consultants**
- › **Professional development tools designed to make you more successful**
- › **Education**

On Wednesday, January 18, we invite you to join us for an evening welcome reception at the InterContinental Toronto Centre where you can network with industry peers in a relaxed and informal setting.

On Thursday, January 19, our full-day conference begins. We will kick off the day with an energetic keynote address by Christopher Kai, international speaker and bestselling author. This year's sessions include roundtable discussions featuring senior consultants who will provide insight into their firm and search trends, an industry update from Greenwich Associates, conversations with leading plan sponsors, and panel discussions focused on endowments and foundations, family offices, and more! Registration is available on the [AIMSE website](#).

I look forward to seeing you in Toronto!

Sincerely,

Kimberley Woolverton, CFA

Aberdeen Asset Management Inc.

Conference Chair





24th Annual AIMSE Canadian Conference

Preliminary Agenda



Speakers listed are confirmed to date and subject to change

WEDNESDAY JANUARY 18, 2017

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

Intercontinental Toronto Centre

THURSDAY JANUARY 19, 2017

7:30 am – 8:00 am **Breakfast**

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

AIMSE Canada President & Conference Chair

Kimberley Woolverton, CFA

Senior Business Development Manager, *Aberdeen Asset Management Inc.*

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

8:30 am – 9:30 am **Keynote Address by Christopher Kai | *The Billionaire Mindset: The Art & Science of Successful Business Relationships***

In a world of ubiquitous social media, smartphones and 24-hour cable TV, we have never been more connected to news and current events in the digital world. But how do we stay connected, grounded, and focused in the real world so we can find the best jobs, promotions, investments, business and career opportunities? In this inspiring, insightful and what numerous audience members have hailed as a “life-changing” experience, entrepreneur, international speaker, homeless youth pioneer, and Amazon # 1 bestselling author Christopher Kai shares 7 insightful strategies on how you can catapult your personal and professional opportunities by understanding the art and science of successful relationship building.

Seven Takeaways

1. Why Your Network is the #1 Best Predictor of Your Career Success (Forbes)
 2. The Billionaire Mindset Based on 20 Years of Research
 3. How to Be 90% More Effective as a Communicator
 4. Follow Up the Right Way and Be 80% More Successful
 5. How One Charity Raised \$101M in One Night and Why You Should Care
 6. These 4 Happy Chemicals Will Help You Connect With Anyone
 7. Stand Out and Be Remembered 22x Better
-



» Thursday, January 19 continued...

9:30 am – 10:30 am **Endowments & Foundations: Investment Trends & Interests**

Institutional investors have generally enjoyed a benign, low volatility world over the last several years. Co-ordinated accommodative monetary policy has led equity prices higher and bond yields lower, resulting in an environment of weaker expected future returns and questions around future growth and the impact of rising rates. Join us as we speak to several prominent endowments and foundations on where they are looking to help achieve their investment goals.

- » Status of the Endowment Model in 2017
- » What are E&F's doing to meet their objectives in today's challenging market environment
- » Trends with E&F's as related to Alternative Assets
- » Thoughts on Active vs Passive Management
- » Sustainable/Impact Investing & ESG
- » Is the role of the Consultant changing with E&F's
- » Investment Outsourcing

Moderator: **Robin Stanton, CFA**
Vice President, *AGF Investments*

Speakers: **Tom Ball**
Chief Investment Officer, *The Asper Foundation*

Eugene Lee, CFA
Vice President, Investments, *Vancouver Foundation*

Bruce Myers, CFA
Head, C/A Capital Management, *Cambridge Associates LLC*

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

11:00 am – 12:30 pm **Consultant Roundtables**

A hallmark of the AIMSE conferences, the consultant roundtables are always one of the most popular sessions. Join us for an interactive and candid discussion with leading consultants from global and Canadian firms. Come with your questions and hear top consultants share their thoughts on what investors are doing, which asset classes are in demand and how to get (and keep) your products on the radar. There's no formality – just you and your fellow marketers discussing manager search activity, organizational updates, new trends in the consulting industry, how best to communicate with these influential consultants and more. You'll gain great insights from a wide array of top consulting firms and begin the process of building relationships with these key people in an intimate and interactive setting. Don't miss this opportunity for you and your peers to have a direct dialogue with consultants on the key topics and issues confronting marketing professionals today.



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Thursday, January 19 | 11:00 am – 12:30 pm Consultant Roundtables continued...

Moderator: **Joyce Hum, CFA**
Vice President, Consultant Relations, *Guardian Capital LP*

Speakers: **Ryan Anderson**
Senior Consultant & Director, Manager Research, *Pavilion Advisory Group Ltd.*

Sofia Assaf, CFA, FRM
Director of Client Consulting–Canada, *Mercer*

Zaheed Jiwani, CFA
Senior Consultant, *Eckler Ltd.*

Gord Lewis
Senior Vice President, *Proteus*

Scott MacDonald
Senior Investment Consultant, *Willis Towers Watson*

Bill MacLean
Partner, *Aon Hewitt*

Janet Rabovsky
Partner, *Element*

Dianne Tamburro, CFA
Vice President, *Accompass*

Ruo Tan, CFA
President, *Segal Rogerscasey Canada*

Marcus Turner
Investment Principal, *Morneau Shepell*

12:30 pm – 1:30 pm **Networking Lunch**

1:30 pm – 2:15 pm **Canadian Institutional Market Trends Update with Greenwich Associates**

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

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

Speaker: **Davis Walmsley**
Principal, *Greenwich Associates*



Thursday, January 19 continued...

2:15 pm – 3:15 pm Targeting Ultra High Net Worth Investors and Family Offices

Canada has a very large and growing market of Ultra High Net Worth Investors. The Canadian Banks have redirected their efforts to enhancing their service offering and people with the skill sets to manage, grow and sustain multi-generational wealth. Many boutique firms are springing up to fill a void in the Canadian marketplace as well. As an Investment Management Sales Executive, how do you tap this growing market in an effective way? This session will address the scope of the market in Canada, the key players, how to prospect in this environment and what the product demand is for this space.

The speakers for the session come from a wide variety of backgrounds and they have all been very successful focusing on this market in Canada.

Moderator: **Angela Vidakovich, CIM**
Director, Marketing & Client Service, *Brookfield Investment Management*

Speakers: **Susanne Alexandor**
Vice President, Client Portfolio Manager, *Cougar Global Investments*

Karen Azlen
Chief Executive Officer, *Introduction Capital*

David D. Kilburn
National Director, *CIBC Private Investment Counsel*

Tom McCullough
Chief Executive Officer, *Northwood Family Office*

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

3:35 pm – 4:35 pm Allocator Panel

The theme for the 24th Annual AIMSE Canadian conference is *Embrace Change*. This prominent plan sponsor panel will address and debate a range of issues confronting Canadian pension plans and their beneficiaries, including: pension regulation changes, funding concerns and strategies to address them, the success/failure of OCIO models and the changing role of consultants, and today's investment landscape together with the solutions that are in demand. The panel will offer insights, direction and take questions from session attendees.

Moderator: **Jay Wiltshire, CFA**
Vice President, Institutional Relationships, *Greystone Managed Investments Inc.*

Speakers: **Derek Dobson**
Chief Executive Officer & Plan Manager, *CAAT Pension Plan*

Additional speakers coming soon!

4:35 pm Conference Concludes



24th Annual AIMSE Canadian Conference

General Information



Registration Information

Deadlines:

- › Early Bird Registration:
December 15, 2016
- › Registration deadline for inclusion in printed attendee list:
December 30, 2016
- › Cancellation Refund Request:
January 2, 2017

All Exhibitors Must Pre-Register.

Contributions or gifts to AIMSE are not deductible as charitable contributions for federal income tax purposes. However, dues payments are deductible by members as an ordinary and necessary business expense.

For clarification on registration policies, please call the AIMSE office at:
703.234.4098

Cheque Payments: Please print a copy of your registration form and include it with your cheque made payable to AIMSE. Send to the following address:

› **AIMSE**
11130 Sunrise Valley Drive
Suite 350
Reston, Virginia 20191

Attendee List: Your registration must be received by **December 30, 2016** for your name to be included in the printed list of attendees. **Attendee registration lists will not be distributed prior to the conference.**

Registration Fees

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

- › **Early Bird** (until December 15)
\$895 USD (per AIMSE member)
\$745 USD (per AIMSE member)
two or more individuals attending from the same firm
- › **Regular** (after December 15)
\$995 USD (per AIMSE member)
\$795 USD (per AIMSE member)
two or more individuals attending from the same firm

Hotel Reservations:

- › **Intercontinental Toronto Centre**
225 Front Street West
Toronto, ON M5V 2X3

A block of rooms has been reserved for conference participants at the special rate of **\$259 CAD** per night for a single room. To reserve a room, call the Intercontinental Toronto Centre directly at: **1.800.235.4670**. Individuals **MUST** state that they are with the 2017 AIMSE Annual Canadian Conference to receive the group rate.

To reserve a room online, please visit:
<https://aws.passkey.com/go/AIMSE17>

The hotel reservation cut-off date is:
December 15, 2016.

Refund Policy: Refunds will be granted by AIMSE for requests received in writing by **January 2, 2017**. An administrative fee of **\$250** will be assessed to all refunds. No refunds will be granted after January 2, 2017 but another AIMSE member from your firm may attend in your place. All requests for registration refunds and/or transfers must be made in writing.



24th Annual AIMSE Canadian Conference Registration Form



FULL NAME

TITLE

BADGE NAME

FIRM

MAILING ADDRESS

CITY

STATE

ZIPCODE

COUNTRY

PHONE

FAX

EMAIL

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\$795 USD (per AIMSE member)

two or more individuals attending from the same firm

Membership Dues*:

Active Membership Dues **\$350 USD**

Associate Membership Dues **\$450 USD**

* Please submit dues only if you are NOT already a current member. Only current members are eligible to attend. If you are unsure of your membership status, please call the AIMSE office at **703.234.4098**.

Payment Information

Enclosed is my **cheque**, payable to AIMSE (*Remittance accepted ONLY in US currency*)

Please **charge** payment to: VISA MasterCard American Express

CARD NUMBER

EXP DATE

NAME ON CARD

SIGNATURE

» AIMSE

11130 Sunrise Valley Drive, Suite 350

Reston, Virginia 20191

FAX: 703.435.4390 | info@aimse.org

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

A large, stylized red maple leaf graphic is positioned in the bottom right corner of the page. It is composed of several overlapping, semi-transparent red triangles of varying shades, creating a layered effect. The leaf points upwards and to the right.

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