



26th ANNUAL
AIMSE CANADIAN CONFERENCE

January 16-17, 2019
Intercontinental Toronto Centre
Toronto, ON

PRELIMINARY PROGRAM





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The Association of Investment Management Sales Executives (AIMSE) welcomes you to the 26th Annual Canadian Conference!

For almost 3 decades, 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 16, we invite you to join us for an evening welcome reception at the conference hotel where you can kick off the conference by networking with industry peers in a relaxed and informal setting.

On Thursday, January 17, our full-day conference begins. We will kick off the day with an insightful keynote address by Mark Bowden, an expert in body language, human behavior and communication. This year's sessions include a combined consultant and plan sponsor roundtable with leading investment professionals who will share their view on the future of institutional investment management, an industry update from Greenwich Associates, and more! Registration is available on the AIMSE website.

I look forward to seeing you in Toronto!

Sincerely,

Kimberley Woolverton, CFA | President, AIMSE Canada & Conference Chair
Foyston, Gordon & Payne Inc.



Preliminary Agenda

WEDNESDAY JANUARY 16, 2019	
5:30 pm – 8:00 pm	Opening Cocktail Reception
THURSDAY JANUARY 17, 2019	
7:30 am – 8:00 am	Networking Breakfast with Exhibitors
8:00 am – 8:10 am	Welcome & Introduction Kimberley Woolverton, CFA President, AIMSE Canada & Conference Chair Senior Vice President, Institutional Client Services Foyston, Gordon & Payne Inc.
8:10 am – 8:30 am	Now a Word from Our Sponsors
8:30 am – 9:30 am	Keynote Address by Mark Bowden Winning Body Language to Build Trust, Gain Credibility, and Sell Voted the #1 Body Language Professional in the world, Mark Bowden is passionate about giving people the most influential and persuasive communication techniques to stand out, win trust, and build credibility every time they speak. Inspiring, energetic, engaging, and entirely entertaining, Mark's memorable talks not only educate, but have proven life changing for audiences, helping their businesses grow across all industries and sectors.
9:40 am – 10:40 am	The OCIO Landscape - Get on the Bus or Be Left Behind Chief Investment Officers stand at the forefront of managing portfolios in the face of changing market dynamics and investing for the long-term in a new paradigm. Whether it be the latest market corrections, the ongoing debate regarding the delegation of fiduciary responsibility, the viability of defined-benefit retirement plans or determining optimal asset allocation, the role of the CIO holds great importance in navigating through uncertainty, not to mention the role of the investment manager. The panel will address the development of the OCIO marketplace, including, their respective business objectives, client strategy, and relationship with the investment management community. Additionally, issues related to conflict of interest, legal and regulatory, as well as investment strategy, service models, compensation schemes, and more will be discussed. Moderator Jay Wiltshire, CFA Vice President, Institutional Relationships Greystone Managed Investments, Inc. Speakers Yvan Breton Head of OCIO Services Mercer Global Investments Canada Chris Kautzky, CFA Managing Director Aon Hewitt Investment Management Inc. Jennifer Ryan Managing Director BlackRock



Preliminary Agenda

10:40 am – 11:10 am	Refreshment Break with Sponsors & Exhibitors
11:10 am – 12:00 pm	<p>How OPTrust Thinks about Investing</p> <p>With net assets of over \$20 billion, OPTrust invests and manages one of Canada's largest pension funds. OPTrust is a global investor with a team of experienced investment professionals located in Toronto, London and Sydney. OPTrust's investment mandate focuses on achieving the organization's mission to pay pensions today and preserve pensions for tomorrow. We are a pension management organization. Our members depend on us to provide secure, predictable income in retirement. As such, how we think about investing and how we manage our plan needs to fully align with our members' interests. In 2017, we internalized a significant portion of our public markets assets and activities as part of our overall member-driven investing strategy.</p> <p>Moderator Karynna Ma Vice President, Institutional Sales Timbercreek Asset Management</p> <p>Speaker James Davis, CFA Chief Investment Officer OPTrust</p>
12:00 pm – 1:00 pm	Networking Lunch
1:00 pm – 2:30 pm	<p>Plan Sponsor & Consultant Roundtable</p> <p>A hallmark of the AIMSE conferences, the roundtable is one of the most popular sessions. Join us for an interactive and candid discussion with leading consultants and pension plan sponsors from global and Canadian firms. Come with your questions and hear these top investment professionals share their thoughts on what investors are doing, seeing and expecting from their managers. There's no formality — just you and your fellow marketers discussing manager search activity, organizational updates, new trends, how best to communicate with these influential consultants and plan sponsors and more. You'll gain great insights from a wide array of top 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 on the key topics and issues confronting marketing professionals today.</p> <p>Moderator Brad Haughey, CFA Investment Product Specialist Black Creek Investment Management</p> <p>Speakers Tanya Bishop Senior Investment Consultant Aon Hewitt Canada</p> <p>Samantha Cleyn Principal, Senior Investment Consultant Mercer</p> <p>Joe Connolly Vice President, Asset & Risk Management Morneau Shepell Ltd.</p> <p>Ross Dunlop, FSA, FCIA, CFA Principal Ellement Consulting Group</p>



Preliminary Agenda

1:00 pm – 2:30 pm	<p><i>Plan Sponsor & Consultant Roundtable (cont.)</i></p> <p>Andrew Greene Director, Pension Investments Toronto Transit Commission Pension Fund Society</p> <p>Theva Naidoo Director, Pension Fund Hydro One Inc.</p> <p>Christine Tessier Vice President, Investments & Treasury CAA Club Group</p> <p>Natasha Trainor, CFA Chief Investment Officer Provident 10</p> <p>Marcus Turner, CFA, FRM Senior Director, Investments Willis Towers Watson</p>
2:30 pm – 2:55 pm	Refreshment Break with Sponsors & Exhibitors
2:55 pm – 3:55 pm	<p>The Future of Defined Contribution Plans in Canada</p> <p>The Pension landscape has changed dramatically around the world over the last decades with the decline in creation of new Defined Benefit Pension Plans. Outside of government sponsored Pension Regimes, the corporate Defined Benefit Pension Plans have been closed and have been replaced by Defined Contribution options. There are many shifts taking place to make Defined Contribution Pension Plans look more like Defined Benefit Plans in areas such as asset allocation, outcome-oriented investment options, decumulation options and an improved client experience. In this session, you will be introduced to the leading Canadian Defined Contribution platforms. These platforms will provide you with background on where they see their product shelf and service offerings evolve through time. These firms are global, and they will also be able to share best practices both North and South of the US – Canada border.</p> <p>Moderator Angela Vidakovich, CIM Director, Client Relationship Management Brookfield Investment Management</p> <p>Speakers Nadia Darwish Vice President, Development, Marketing & Investment Strategy Desjardins</p> <p>Keith Holden, CFA Head of Retirement Platform Development & Management, North America Manulife</p> <p>Thomas Reid Senior Vice President, Group Retirement Services Sun Life Financial Canada</p>



Preliminary Agenda

4:00 pm – 4:45 pm	<p>Canadian Institutional Market Trends Update with Greenwich Associates</p> <p>Greenwich Associates, a leading research-based consulting firm which provides competitive insights to asset managers, will share strategies on how to compete and win in a maturing industry.</p> <p>Moderator Kimberley Woolverton, CFA President, AIMSE Canada & Conference Chair Senior Vice President, Institutional Client Services Foyston, Gordon & Payne Inc.</p> <p>Speaker Susan Gould Consultant Greenwich Associates</p>
4:45 pm – 5:00 pm	<p>Closing Remarks</p>

*Speakers listed are confirmed to date and subject to change



General Information

WHO CAN ATTEND

Only current, paid AIMSE members are eligible to attend the Canadian Conference. Please contact the AIMSE office if you are unsure of your membership status or to request a membership application. Executive recruiters, consultants and members of the “working press” are not eligible for AIMSE membership and are therefore ineligible to attend the Canadian Conference.

REGISTRATION FEES

Remittance accepted ONLY in US currency.

EARLY BIRD <i>until December 15</i>	REGULAR <i>after December 15</i>
AIMSE MEMBER \$995 USD	AIMSE MEMBER \$1145 USD
TWO OR MORE AIMSE MEMBERS ATTENDING FROM THE SAME FIRM \$845 USD per person	TWO OR MORE AIMSE MEMBERS ATTENDING FROM THE SAME FIRM \$945 USD per person

DEADLINES

- Early Bird Registration – **December 15, 2018**
- Registration deadline for inclusion in printed attendee list – **December 22, 2018**
- Cancellation/Refund Request – **January 7, 2019**

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, VA 20191

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.

REFUNDS/CANCELLATIONS

Refunds will be granted by AIMSE for requests received in writing by January 7, 2019. An administrative fee of \$250 will be assessed to all refunds. No refunds will be granted after January 7, 2019 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 to info@aimse.org and come from the registered member.

ATTENDEE LIST

AIMSE does not distribute attendee lists prior to the conference. Conference participants will receive a printed list of attendees within their on-site registration materials. A final, electronic list will be provided post-conference. Your conference registration must be received by December 22, 2018 to be included in the printed material.

PHOTOGRAPHY POLICY

From time to time, AIMSE may use photographs and video taken during its meetings and events in marketing, social media posts, and other promotional outlets. By virtue of your attendance, you agree to use of your likeness in such media.

PRIVATE PARTY POLICY

Hosted parties in which attendance is restricted to either verbal or written invitations are not permitted at any AIMSE Conference.

ROOM DELIVERY POLICY

Only exhibiting companies are permitted to conduct deliveries of promotional materials to AIMSE Conference attendees' rooms.



General Information

RECOMMENDED DRESS

All sessions and events are business casual.

AIMSE MEDIA POLICY

AIMSE does not issue media passes to any AIMSE conferences or events. All media representatives must be current Associate members and pay the conference registration fee. All attendees must read and adhere to the AIMSE media policy. Exhibitor representatives must sign the Policy Agreement Form.

EXHIBITOR/SPONSOR REGISTRATION

Please refer to the Sponsor & Exhibitor Prospectus for specific policies. All individuals attending the conference as exhibitors must submit registration forms and fees together. The Exhibitor Fee allows each exhibiting company to send two individuals to attend the conference and participate in all activities. Additional exhibit staff members who wish to attend the conference must be current AIMSE members and pay the applicable registration fee as outlined in the prospectus.

For further information:

AIMSE
11130 Sunrise Valley Drive
Suite 350
Reston, VA 20191
Phone: 703.234.4098
Fax: 703.435.4390
info@aimse.org www.aimse.org

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 \$279 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 AIMSE Canadian Conference to receive the group rate.

- To reserve a room online, please visit:
<https://aws.passkey.com/go/AIMSE2019>
- The hotel reservation cut-off date is:
December 23, 2018



Registration Form

FIRST NAME _____ LAST NAME _____ BADGE NAME _____

JOB TITLE _____ FIRM _____

MAILING ADDRESS _____

CITY _____ STATE _____ ZIP _____ COUNTRY _____

PHONE _____ EMAIL _____

The personal information ("personal data") you provide on this form is being collected with your consent, for the exclusive purpose of permitting AIMSE to facilitate your registration for the 2019 Canadian Conference and to contact and bill you in connection with that event and/or your AIMSE membership status. The personal data is subject to the terms of AIMSE's privacy policy (<https://www.aimse.org/privacypolicy.cfm>). A party located in the European Union or European Economic Area wishing to exercise rights under the General Data Protection Regulation (GDPR) with respect to such personal data should contact privacy@aimse.org. Fees EARLY BIRD

Conference Registration Fee

AIMSE Member

☐ **\$995 USD** (Until December 15)

☐ **\$1145 USD** (After December 15)

Two or more AIMSE Members attending from the same firm

☐ **\$845 USD** per person (Until December 15)

☐ **\$945 USD** per person (After December 15)

Membership Dues

Please only 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.

☐ ACTIVE **\$350 USD**

☐ ASSOCIATE **\$450 USD**

Total Due \$ _____

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 _____ CSC _____

DATE _____ NAME ON CARD _____

SIGNATURE _____



AIMSE
CANADA

Please return with payment to:

AIMSE | Attn: Katie Earley
11130 Sunrise Valley Drive,
Suite 350
Reston, Virginia 20191
FAX: 703.435.4390
kearley@virtualinc.com



Save the Date

AIMSE 42nd ANNUAL MARKETING & SALES CONFERENCE

APRIL 28-30, 2019
ARIZONA BILTMORE
PHOENIX, AZ



AIMSE

AIMSE 2019 FALL CONFERENCE

OCTOBER 16-17, 2019
THE WESTIN NEW YORK AT TIMES SQUARE
NEW YORK, NY





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