



26th ANNUAL
AIMSE CANADIAN CONFERENCE

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

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!

I look forward to your participation!

Sincerely,


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



Conference Agenda


WEDNESDAY JANUARY 16, 2019	
5:30 pm – 8:00 pm <i>Ontario Room</i>	Opening Cocktail Reception
THURSDAY JANUARY 17, 2019	
7:30 am – 8:00 am <i>Ballroom A</i>	Networking Breakfast with Exhibitors
8:00 am – 8:10 am <i>Ballroom B</i>	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 <i>Ballroom B</i>	Now a Word from Our Sponsors
8:30 am – 9:30 am <i>Ballroom B</i>	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 <i>Ballroom B</i>	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 Partner, Head of Fiduciary Management for Canada Mercer Chris Kautzky, CFA Managing Director Aon Hewitt Investment Management Inc. Jennifer Ryan Managing Director BlackRock Brad Rowe, CFA Principal, Investment Consulting Eckler Ltd.



10:40 am – 11:10 am <i>Ballroom A</i>	Refreshment Break with Sponsors & Exhibitors <div>Sponsored by</div> 
11:10 am – 12:00 pm <i>Ballroom B</i>	How OPTrust Thinks about Investing <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 <i>Ontario/Niagara Room</i>	Networking Lunch
1:00 pm – 2:30 pm <i>Ballroom B</i>	Plan Sponsor & Consultant Roundtable <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, CFA, MBA 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>



Conference Agenda

<p>1:00 pm – 2:30 pm <i>Ballroom B</i></p>	<p>Plan Sponsor & Consultant Roundtable (cont.)</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>Rajiv Silgardo President & Chief Executive Officer UBC Investment Management Trust Inc.</p> <p>Christine Tessier, CFA 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>
<p>2:30 pm – 2:55 pm <i>Ballroom A</i></p>	<p>Refreshment Break with Sponsors & Exhibitors</p> <p>Sponsored by </p>
<p>2:55 pm – 3:55 pm <i>Ballroom B</i></p>	<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, Marketing & Client Service 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>



4:00 pm – 4:45 pm <i>Ballroom B</i>	<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 <i>Ballroom B</i>	Closing Remarks



Callan LLC

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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Keynote Speaker



MARK BOWDEN

Speakers

TANYA BISHOP

Senior Investment Consultant
Aon Hewitt Canada



YVAN BRETON

Partner, Head of Fiduciary
Management Canada
Mercer

Yvan Breton is a Partner and the Head of OCIO Services for Canada. In his role, he is responsible for developing and managing

Mercer's OCIO business and capabilities in Canada, and overseeing Mercer's full suite of OCIO investment services. Yvan has extensive experience in working with clients in developing advisory and fiduciary management related solutions across the full breath of institutional investment issues.

Yvan joined Mercer in 1998 and has held a number of senior roles across the firm, including Business Leader, Investment Consulting for Canada and Latin America. He is a member of the Canadian Wealth Leadership Team.



SAMANTHA CLEYN, CFA, MBA

Principal, Senior Investment Consultant
Mercer

Samantha is a Principal and Senior Investment Consultant in Mercer's Wealth business in Montreal. She joined Mercer in early 2016 from Pavilion Advisory

Group where she held the role of Research Consultant and Research Team Lead. In her career, she has worked closely with many large Canadian plan sponsors on a project-basis to conduct manager searches as well as provide asset class education and advise on manager selection, suitability and structure optimization decisions. In her role at Mercer Samantha continues to work with many larger plans with external manager programs in this capacity. In her career, she has conducted over 1,200 investment managers meetings across the globe and conducted close to 150 manager search projects across various equity, fixed income and alternative asset classes.

Samantha is a member of the Executive Leadership Team for Wealth in Montreal and a manager to a team of Associates and Analysts. She is a member of both the DB and DC teams and a voting member of Mercer's Canadian Manager and DC Ratings Committees.

She consults to clients across Canada. Her client base is a diverse group comprised of wealth management programs, foundations, insurers, corporate and public DB plans and DC plans. On a retainer basis, Samantha leads a number of investment consulting relationships with plans or programs over \$1 billion. Clients specifically value her considerable knowledge and perspective on investment managers and their strategies and consider her an expert in the selection and monitoring of investments.

Samantha frequently speaks at industry conferences and Mercer's Global Investment Forum.



JOE CONNOLLY

Vice President, Asset and Risk
Management
Morneau Shepell Ltd.

Joseph (Joe) Connolly is a Vice-President in Morneau Shepell's investment consulting practice with over 25 years of experience in the investment industry. His strength is his ability to provide excellent service to a wide variety of clients. His area of work encompasses assisting regulatory and non-regulatory clients with all aspects of the management of their pension fund investments, which includes performance evaluation of investment managers, investment policy reviews, fund structure and asset-liability analyses (including immunization of plan liabilities), disposition of illiquid assets (including real estate and mortgage private placements), cash management, purchasing of annuities and investment manager searches. Joe also conducts reviews of plan governance structures. Joe has been with Morneau Shepell for 12 years.

**NADIA DARWISH**

Vice President, Development, Marketing & Investment Strategy
Desjardins

Nadia leads the Group Retirement Savings teams at Desjardins responsible for marketing, investment strategy

and product development, and also oversees business development for Ontario and Western Canada. A champion of the client experience, Nadia has been a powerful advocate for the evolution of group retirement and savings plans. Combined with market insights and a passion for driving ideas from concept to market, she is focused on delivering experiences built around engaging and innovative solutions. Nadia is a graduate of Western University and has more than 20 years of industry experience. Committed to the future of the pension industry, Nadia is an active member of several industry advocacy committees.

**JAMES DAVIS, CFA**

Chief Investment Officer
OPTrust

James C. Davis is Chief Investment Officer of OPTrust, one of Canada's largest pension funds with net assets over \$20 billion and investment

professionals in Toronto, London and Sydney.

Mr. Davis joined OPTrust in 2015. He leads the organization's investment strategy and oversees its diversified portfolio spanning the globe with public market, private market, infrastructure, and real estate assets in North America, Europe, Developed Asia and emerging markets.

Mr. Davis has over 25 years of strategic investment planning and leadership experience, including proven results in liability driven investing and portfolio design. Most recently, he held the role of Vice President, Strategy & Asset Mix and Chief Economist at Ontario Teachers' Pension Plan (Teachers').

Before joining Teachers', Mr. Davis was President of FuturesTrend Capital Corporation in Prince Edward Island and Vice President & Head, Global Fixed Income & Currencies at RBC Global Investment Management in Toronto.

Mr. Davis is widely recognized as an engaging speaker in a broad range of forums within the pension industry, and is known for his insights on global economics, portfolio construction and investment strategy.

In addition to degrees in Mathematics and Meteorology, Mr. Davis holds an MBA in Finance from Dalhousie University and is a CFA charterholder.

**ROSS DUNLOP, FSA, FCIA, CFA**

Principal
Ellement Consulting Group

Ross has 28 years of experience as an investment consultant and actuary and is currently responsible for actuarial and investment consulting in all types of

pension, health, and other programs. Prior to joining Ellement in 2014 Ross held the position of Vice-President, Investments & Portfolio Manager of Cardinal Capital Management Inc. Prior to Cardinal Capital Management Inc., Ross was a consultant at Aon Hewitt for over 15 years.

Ross was the Board Chair and Chair of the Investment Committee for the Teachers' Retirement Allowances Fund (TRAF) in Winnipeg from 2014 to 2016. Ross is also a Vice-Chair of the Association of Canadian Pension Management (ACPM) and Chair of ACPM's Governance and Nominating Committee. Formerly, Ross was a Committee Member and Committee Chair of the Canadian Institute of Actuaries, Committee on Investment Practice.

Ross holds a Bachelor of Commerce (Hons.) degree from the University of Manitoba, is a Fellow of the Society of Actuaries, a Fellow of the Canadian Institute of Actuaries, and has also obtained the Chartered Financial Analyst designation.

**SUSAN GOULD**

Consultant
Greenwich Associates

Susan Gould consults with North American investment management and investment consultant clients on a variety of distribution, marketing and product

opportunities. Prior to joining the Investment Management Group, Susan developed and managed senior buy-side relationships, gathering essential information needed for reports and white papers produced across all financial



services products. Previously, Susan spent over 10 years in corporate banking and financial services, focusing on corporate loan structuring and syndications at First Chicago and CIBC. Susan earned her MBA from the University of Chicago Booth School of Business and received a B. A. in Economics from the University of Pennsylvania.



ANDREW GREENE, CIM

Director, Pension Investments
Toronto Transit Commission Pension Fund Society

Andy Greene, CIM, CAIA has over 20 years of investment experience in both the U.S. and Canada as a plan sponsor, portfolio manager, and investment. Andy is the Director, Pension Investments for the Toronto Transit Commission (TTC) Pension Fund Society, a \$7bln defined benefit plan. Prior to this Andy spent eight years at OPTrust, primarily as Director, Public Market Investments overseeing \$9bln in assets across equities, fixed income and hedge funds. Before his work at OPTrust, Andy worked as Northern Trust Asset Management, the University of Wisconsin Foundation and Willis Towers Watson. He holds an M.A. in Applied Economics from Binghamton University and a B.A. in Economics from Ithaca College, the Certified Investment Manager (CIM) and Chartered Alternatives Analyst (CAIA) designations, and is a member of the CFA Institute and CFA Society of Toronto. Andy serves on the Investment Committee for the United Church of Canada Pension Plan and the Leadership Council for Capitalize for Kids, which is a community of financial professionals who invest in kids' mental health research and services.



KEITH HOLDEN, CFA

Head of Retirement Platform Development & Management
North America
Manulife

Based in Toronto, Ontario, Canada, Keith Holden, CFA, Head of Retirement Platform Development & Management, is responsible for handling all investment product decision-making as well as product management and sales support for Manulife Financial's retirement businesses in North America.

Keith has acquired more than 18 years' experience in the financial services industry. In his time at Manulife (John Hancock in the U.S.) beginning in 2005, he has held a variety of roles

of increasing responsibility in wealth and asset management including manager research, product development, relationship management and portfolio management. He is a CFA Charterholder.

Keith earned a BA in Law from Carleton University.



CHRIS KAUTZKY, CFA

Managing Director
Aon Hewitt Investment Management Inc.

Chris is a Partner and Managing Director for Aon Hewitt Investment Management Inc., based in our Vancouver office. Chris has worked with a broad range of clients including defined benefit plans and CAPs sponsored by public and private-sector employers as well as endowments, foundations and insurance companies.

Since 2012, he has led our Outsourced Chief Investment Officer business in Canada, which currently manages over \$8 billion in assets. Chris is a member of the Canadian Investment Practice leadership team and has also been on several thought leadership teams during his career at Aon Hewitt.

Chris joined Aon Hewitt in 2000 in our Toronto office. Prior to 2000, he was Senior Manager, Product Development with HSBC Asset Management and has over 25 years of industry experience. Chris graduated from the University of Western Ontario where he studied Political Science, is a CFA Charterholder and a member of the Vancouver CFA Society.



THEVA NAIDOO

Director, Pension Fund
Hydro One Inc.

Theva Naidoo has been in the investment industry for more than 25 years. Theva has worked at the Alberta Investment Management Corporation (AIMCO) as a Senior Portfolio Manager (External Funds) and was Principal and Investment Consultant at Mercer (Toronto). Theva presently holds the position of Director, Pension Fund at Hydro One. He has been with the Hydro One Pension Plan for just over seven years. Theva's core responsibilities include overseeing the public markets component of the company's defined benefit pension plan. Additionally, he has oversight of the investment component of the DC Plan and is also involved in asset allocation. Theva is active in the pension industry and serves on several not-for-profit investment committees.

Theva spent the formative years of his career in South Africa, primarily as a portfolio manager within the asset management arms of the broader First National Bank and Standard Bank groups. Earlier in his career he served as Divisional Investment Manager with Anglo American plc in Johannesburg. Theva was also involved in investment education in South Africa.

Theva holds a Bachelor of Arts in International Relations, a Bachelor of Commerce (Accounting and Business Economics) and an Honours Bachelor of Commerce (Business Economics – specialization in investment markets).



THOMAS REID

Senior Vice President, Group Retirement Services
Sun Life Financial Canada

Tom oversees Canada's largest provider of defined contribution pension arrangements, covering nearly 1.5 million

Canadians. Since joining Sun Life Financial in 1994 as Assistant Vice-President of Finance, Tom has held increasingly senior positions throughout the Company in the areas of Finance, Corporate Development, Public and Investor Relations, and the Canadian Client Solutions business.



BRAD ROWE, CFA

Principal, Investment Consulting
Eckler Ltd.

Brad is a Principal and leads the Asset Consulting team in Atlantic Canada. Based in the Halifax office, he has 21 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 analytics.

Brad also leads the OCIO advisory consulting team for Eckler Ltd. In this capacity, Eckler does not offer an OCIO solution, but acts as an independent resource for organizations that are looking to determine if the OCIO is the correct fit within the overall program governance model, provides OCIO due diligence and search services as well as ongoing performance monitoring of OCIO providers.

His experience includes 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 Commerce from Memorial University of Newfoundland, and pursued graduate studies in Econometrics and Financial Economics at Dalhousie University. Brad earned his MBA from the Sobey School of Business and also holds the Chartered Financial Analyst (CFA) designation.



JENNIFER RYAN

Managing Director
BlackRock

Jennifer Ryan, Managing Director, is a member of the US and Canada management team within BlackRock's Institutional Client Business. She and

her team are responsible for developing and managing relationships with corporate and public pension plans, with a focus on Outsourced Chief Investment Officer ("OCIO") solutions.

Prior to joining BlackRock in 2016, Ms. Ryan spent 19 years at Goldman Sachs Asset Management ("GSAM") in an array of client-facing roles. From 2010-2016, she was the Head of US Consultant Relations. From 2007-2010 she was an institutional relationship manager responsible for endowment and foundations in the US. Prior to her work in the institutional business, Ms. Ryan was a relationship manager in GSAM's third-party business covering financial institutions. She began her career as a product strategist in GSAM's Global Liquidity business.

During her tenure at Goldman Sachs, Ms. Ryan served as the Head of GSAM's Women's Network, and as a Steering Committee member of the firmwide Women's Network.

Ms. Ryan earned a BA in English and International Studies from Boston College, and an MBA from Columbia Business School where she was a Goldman Sachs Doty Scholar. She resides in New York City with her husband and two children.





RAJIV SILGARDO

President & Chief Executive Officer
UBC Investment Management Trust Inc.

Rajiv has over 30 years' experience in the investment industry as a senior executive and in the area of quantitative asset management.

Prior to joining UBC Investment Management Trust in December 2016, Rajiv was Co-CEO of BMO Global Asset Management. After joining the Bank of Montreal in 2009, Rajiv helped establish and grow BMO GAM from approximately \$50 billion in assets under management to over \$300 billion. Before BMO, Rajiv spent 14 years with Barclays Global Investors (BGI). With \$2.2 trillion in assets under management, BGI was the world's largest and pre-eminent investment firm. Rajiv's most recent position at BGI was as President and CEO in Canada.

Rajiv is a member of the Investment Committee of the Vancouver Foundation. Formerly, he was a member of the TSX Trading Advisory Committee and the Board of Governors of the Bishop Strachan School in Toronto. Rajiv has also served on the Advisory Board at The Ted Rogers School of Business at Ryerson University and the Board of Directors of CETFA (Canada Exchange Traded Fund Association).

Rajiv has been a frequent speaker at industry and media events, and is recognized as a thought-leader in the investment industry. In 2008 he was voted one of the 10 most powerful and influential people in the Canadian investment industry.

Rajiv received his B. Comm (Honours) and M.Com degrees from Delhi University, India, and a Masters of Business Administration from the University of North Carolina at Chapel Hill. He is a CFA Charterholder.



CHRISTINE TESSIER, CFA

Vice President, Investments & Treasury
CAA Club Group

Mrs. Tessier is Vice-President, Investments & Treasury at CAA Club Group (Thornhill), where she oversees the corporate, pension and insurance assets of the company. CAA Club Group is the largest Canadian Automobile Association club, with over 2 million Members across two provinces (Ontario and Manitoba). CAA Club Group is a not-for-profit club that provides emergency roadside assistance & automotive services, home, auto and travel insurance, and

various retail and travel services. She is currently a member of the Investment Advisory Committee to 'The One Investment Program', an investment program designed for Ontario Municipalities. She is a member of PIAC's risk committee. Prior to joining, CCG, she led Invesco's global investment readiness initiative. She originally joined Invesco's global product development team, where she contributed to product development initiatives across the asset class spectrum, from traditional strategies, to real assets, and including liquid alternatives. Mrs. Tessier worked for 8 years at Mercer Investments as part of its global manager research team and was a contributor to its OCIO program. She began her career in Montreal in product management and development at TAL Global Asset Management. She has an Honors Bachelor of Commerce degree from Laurentian University. Mrs. Tessier is a CFA charterholder.



NATASHA TRAINOR, CFA

Chief Investment Officer
Provident 10

Natasha is the Chief Investment Officer at Provident 10, an organization established to deliver investment management and plan administration services in Newfoundland and Labrador. She is responsible for the oversight and strategic direction of the Public Service Pension Plan investment program with \$6.7 billion in assets.

Prior to joining Provident 10, Natasha was the Manager of Pension Investments at the Government of Newfoundland and Labrador where she had investment oversight of all the Government-sponsored pension plans. Originally from Toronto, Natasha began her financial career in investment management at RBC Asset Management and worked as an equity analyst at AGF Management.

Natasha received her Master of Business Administration from the Ivey School of Business at the University of Western Ontario and her Bachelor of Science (Chemical Engineering) from Queen's University. Natasha is a CFA charterholder and a Professional Engineer of Ontario. She is a member of the WorkplaceNL Investment Committee and a member of the Board of Directors of the Pension Investment Association of Canada (PIAC).

**MARCUS TURNER, CFA, FRM**

Senior Director, Investments
Willis Towers Watson

Marcus Turner is a Senior Director in the Investment Consulting line of business of Willis Towers Watson. Among other responsibilities, Marcus is a member

of our DC team which is responsible for developing our intellectual capital.

Marcus specializes in alternative asset class research and has expertise in assessing currency, infrastructure and private equity managers as well as trends and developments in these asset opportunities. A frequent industry speaker, Marcus has spoken on a diverse range of topics including the importance of developing metrics for plan sponsors to assess their progress in improving outcomes for members.

Marcus has over 10 years of investment consulting experience and consults on a wide variety of issues including asset allocation strategy, and investment structure optimization. He has worked with a variety of clients including Pension Plans, Foundations and Municipalities with assets ranging from \$100 million to over \$5 billion. Marcus works with some of the larger DC plans in the Canadian market on all aspects of investment consulting.

Prior to his investment consulting experience he had the opportunity to work in the investment management area of a large multinational insurance company where he was responsible for building and running the institution's proprietary trading desk.

Marcus graduated from the University of Toronto with a major in economics. He is a CFA Charterholder and a member of the Global Association of Risk Professionals. Marcus is currently the Programming Chair of the Toronto CFA Board and was formerly Chair of the CFA Portfolio Management Committee. He also chairs the Risk Management Subcommittee of PMAC.

AIMSE Canada Board Members

**KIMBERLEY WOOLVERTON, CFA**

President, AIMSE Canada &
Conference Chair
Senior Vice President, Institutional Client
Services
Foyston, Gordon & Payne Inc.

Kimberley joined Foyston, Gordon & Payne (FGP) in 2018 to lead the institutional client servicing team. She is also a member of FGP's Investment Committee.

Kimberley's investment career began in 1994. She held positions at The Guardian Group of Funds, Lincoln Trust Company, and Merrill Lynch before moving into institutional business development and client servicing roles at Burgundy Asset Management and Aberdeen Asset Management.

She is a graduate of McGill University (BSc) and is a CFA charterholder.

Kimberley has been actively involved with the Association of Investment Management Sales Executives (AIMSE) and currently serves as the President of AIMSE Canada and as a member of the U.S. Board of Directors.

**SHERRY LEE GREGORY**

Vice President, Consultant Relations
Franklin Templeton Institutional

Sherry Lee Gregory is a vice president of Consultant Relations, part of Franklin Templeton Institutional's Global Consultant Relations and Investment Platform Division for North America. Ms. Gregory joined Franklin Templeton Investments in 2014 and is responsible for positioning Franklin Templeton's institutional investment capabilities with investment consultants across Canada. Additionally, Ms. Gregory's efforts include building relationships with a broad spectrum of global and regional consultants to ensure they are well educated and informed on the firm's equity, fixed income and alternative strategies for the Canadian market.

Prior to joining Franklin Templeton, Ms. Gregory was the director of Business Development at RBC Investor & Treasury Services, where she was responsible for strategic sales and business development across a deep bench of investment



and custody services in Atlantic Canada and the U.S. She also worked for Aon Consulting and Johnson Inc., a division of Royal Sun Alliance. Ms. Gregory holds a B.Comm. from Memorial University of Newfoundland and an M.B.A from Saint Mary's University in Halifax, Nova Scotia, and has more than 30 years of industry experience.



BRAD HAUGHEY, CFA

Investment Product Specialist
Black Creek Investment Management Inc.

Brad joined Black Creek Investment Management in October 2017 and brings 18 years of investment industry experience with him. At Black Creek he works with the business development and client relations team to help deliver in-depth communication to clients and investment consultants on our investment philosophy, process and investment strategies.

Prior to Black Creek, Brad was a Vice President, Marketing & Client Services with Sprucegrove Investment Management, where he had marketing and client service responsibilities for clients, consultants and prospects across the United States and Canada. Previously, he was a Vice President and Product Specialist, Canadian Equities, with Greystone Managed Investment and a Vice President with McLean Budden, working as a product specialist covering international equities. Brad also worked at SEI Investments in performance measurement and portfolio analytics.

In addition to his CFA Charter, Brad holds a Bachelor of Arts in Economics from Queen's University, and an Honours Bachelor of Commerce from the University of Windsor.



JOYCE HUM, CFA

Director, Consultant Relations, Institutional Sales & Service
BMO Global Asset Management

Joyce is responsible for developing and managing relationships with Canadian institutional investment consultants in collaboration with BMO GAM consultant relations directors globally. In addition, she educates manager research and field consultants on BMO GAM investment strategies. Joyce comes to the organization with 24 years of experience having worked in similar roles with both Guardian Capital LP and State Street Global Advisors. Previous to that she held a consultant role

with Towers Perrin, Asset Consulting Group. In the industry, she is known for building long-term relationships with clients and providing exceptional service. Joyce received her MBA from the Schulich School of Business and became a CFA charterholder in 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.



KARYNNA MA

Vice President, Institutional Sales
Timbercreek Asset Management

Karynna Ma joined Timbercreek in 2017 as Vice President, Institutional Sales. She is responsible for business development and relationship management within the institutional channel in North America.

Ms. Ma has over 15 years of experience providing financial products and services to both retail and institutional investors in public and private markets. Prior to joining Timbercreek, she was Vice President, Investor Relations at Bastion Infrastructure Group, Director, Managed Assets at Mackenzie Investments and worked at Fidelity Investments where she held a number of positions in the product, sales and marketing areas.

Ms. Ma holds a Bachelor of Arts in Political Science from the University of Toronto.



ANGELA VIDAKOVICH, CIM

Director, Marketing & Client Service
Brookfield Investment Management

Angela Vidakovich has 31 years of industry experience and is a Director, Marketing & Client Service for the Public Securities Group. She is based in Toronto and responsible for Wealth Management, Insurance and Banking Channels in Canada. Prior to joining the firm in 2009, she held several roles covering investment management, back-office investment services, and commercial real estate for the institutional market in Canada. Angela worked in institutional sales for RBC Securities Services (formerly known as Royal Trust), State Street, and UBS Global Asset Management. Angela also has experience in marketing, sales and product development for both public and private real asset strategies and funds. She started her career in Office Leasing with CBRE (formerly known as Coldwell Banker). Angela holds the Canadian Investment Manager designation (CIM) and earned a Bachelor of Arts degree from the University of Toronto.



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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