



**Conference Agenda**

**Thursday, April 11, 2019**

8:00 a.m.	Registration / Breakfast / Networking sponsored by <b>Manulife Securities</b>	
8:45 a.m.	Opening Remarks: <b>Carol Chow</b> , Chair - CIFP Retirement Institute <b>Pat Bolland</b> , Business Media Guru	
9:00 a.m.	<b>Dr. Ian Lee</b> , PhD. Associate Professor, Sproull School of Business - Carleton University <b>Reforming Canada's Retirement Savings System - Solutions for a Non-Existent Problem?</b>	
9:45 a.m.	<b>Richard Poulin</b> , CIM, FMA, FCSI Director, Regional Sales - BMO Global Asset Management <b>Retirement Income Streams: What's in your nest egg?</b>	
10:30 a.m.	Networking Break sponsored by <b>Raintree Financial Solutions Inc.</b>	
10:50 a.m.	<b>John Natale</b> , LL.B., B.Comm. EPC, CFP® Assistant Vice President - Tax, Retirement & Estate Planning Services, Wealth - Manulife Securities <b>The Bottom Line on Retirement Income</b>	
11:35 a.m.	<b>Don Ezra</b> Graduated from full-time work <b>Longevity Insurance</b>	
12:20 p.m.	<b>Concurrent Education Sessions</b>	
	<b>Matt Simpson</b> , MBA, CIM® VP of Ontario Region - Raintree Financial Solutions Inc. <b>Alternative Fixed Income: Why Canada's Top Managers are Relying on Alternative Products to Generate Retirement Income</b>	<b>Freddie Dogterom</b> , CCDP, CPT, P.R.P., RRC® Accredited Speaker - Freddie Speaks! <b>Client Conversations with a Personality Advantage</b>
1:05 p.m.	Lunch / Networking sponsored by <b>BMO Global Asset Management</b>	
1:45 p.m.	<b>Karen Henderson</b> , Hon. BA, CPCA Founder/CEO - Long Term Care Planning Network <b>Aging Well In Today's World: How Advisors Can Help Their Clients Make It Happen</b>	
2:30 p.m.	<b>Chet Brothers</b> , CFP® Brothers & Company Financial <b>Understanding Investor Behaviour</b>	
3:15 p.m.	Networking Break sponsored by <b>CIFP Retirement Institute</b>	
3:35 p.m.	<b>Carolyn M. Fallis</b> , MTax, CPA, CA, CFP®, Fellow of FPSC Professor, School of Accounting and Finance - George Brown College <b>Tax Planning for Your Clients</b>	
4:20 p.m.	Closing Remarks: <b>Pat Bolland</b> , Business Media Guru	
4:30 p.m.	<b>Concurrent Education Sessions</b>	
	<b>Aslan Mirkalami</b> Transformational High-Performance Coach, Award Winning Author, and Speaker - Result Doctor <b>How Work Identity Impacts Retirement Happiness</b>	<b>Dr. Amar Rahou</b> , PhD., MSc, BSc. Professor in Finance Degree - The Business School, Humber Institute of Technology and Advanced Learning <b>Retirement Planning for Different Generations</b>
5:15 p.m.	Networking Reception sponsored by <b>Manulife Securities</b>	
7:30 p.m.	Conference Adjourns	