



RETIREMENT CANADA DIALOGUE 2023

TORONTO
October 2nd, 2023
Marriott Downtown

Conference Agenda *Subject to Change*

Monday, October 02, 2023

8:00 a.m.	Registration / Breakfast / Networking sponsored by Fidelity Investments Canada
8:45 a.m.	Opening Remarks: Retirement Canada Dialogue 2023 Tony Mahabir , MBA, CMC, CIM, RRC®, CFP® <i>Chair – The Canadian Institute of Financial Planning</i> Carol Chow , RRC®, CFP® <i>Chair – CIFP Retirement Institute</i>
9:00 a.m.	Reaching Retirement Goals Amidst Macroeconomic Headwinds: Fidelity's 2023 Retirement Survey Michelle Munro <i>Director, Tax and Retirement Research – Fidelity Investments Canada</i>
10:00 a.m.	Why Haven't You Proposed a Personal Pension Plan Yet to Your Incorporated Clients? Jean-Pierre A. LaPorte <i>CEO – Integris Pension Management Corp.</i>
11:00 a.m.	Networking Break sponsored by CIFP Retirement Institute
11:30 a.m.	Advanced Retirement Income Planning – Creating Your Retirement Story Lori Clements <i>Director, Advanced Planning – Sun Life Global Investments</i>
12:30 p.m.	Lunch / Networking sponsored by Chartwell Retirement Residences RRC/RFRA Top-up Course Examination Bootcamp Carol Chow , RRC®, CFP® <i>Chair - CIFP Retirement Institute</i>
2:00 p.m.	Sales, Stereotypes, and Seniors: Building Trust with your Mature Clients Stephanie Jardine <i>Director of Regional Sales in the Toronto Area – Chartwell Retirement Residences</i>
3:00 p.m.	Digital Assets, Estate Planning and The Law: What You and Your Clients Need to Know Demetre Vasilounis , BA (Honours), J.D. <i>Estate and Family Wealth Planning – Fasken</i>
4:00 p.m.	Networking Break sponsored by CIFP Retirement Institute
4:30 p.m.	Current Trends and Issues in Financial Planning Tony Mahabir , MBA, CMC, CIM, RRC®, CFP® <i>Chair – The Canadian Institute of Financial Planning</i>
5:30 p.m.	Closing Remarks & Prize Announced from participation in the Sponsor Networking Breaks Tony Mahabir , MBA, CMC, CIM, RRC®, CFP® <i>Chair – The Canadian Institute of Financial Planning</i>
5:45 p.m.	Conference Adjourns

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