

# 2023 ANNUAL LEADERSHIP CONFERENCE

IFIC THE INVESTMENT FUNDS INSTITUTE OF CANADA L'INSTITUT DES FONDS D'INVESTISSEMENT DU CANADA

Thursday, October 5 | Toronto Region Board of Trade, 100 Queens Quay East

LEARN | GROW | CONNECT

8:00 a.m. – 8:45 a.m.

**Breakfast & Registration**

8:45 a.m. – 8:50 a.m.

**CONFERENCE WELCOME**

[Bruce Sellery](#), Business Journalist | Bestselling Author of Moolala

8:50 a.m. – 9:00 a.m.

**IFIC CHAIR'S OPENING REMARKS**

[Judy Goldring](#), President and Head of Global Distribution, AGF Management Ltd.

9:00 a.m. – 9:50 a.m.

**OPENING KEYNOTE**

Our dynamic and engaging keynote speaker Benjamin Tal will be familiar to you from his many media appearances. Tal is Managing Director and Deputy Chief Economist at CIBC, and he will set the stage for the conference by shedding light on some of today's most relevant financial issues. What is the role of labour market dynamics, real estate, global credit markets, international trade, interest rates, the unexpected strength in household spending, and overall economic conditions on investors and the investment funds industry?

[Benjamin Tal](#), Managing Director — Deputy Chief Economist, CIBC World Markets Inc.

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9:50 a.m. – 10:40 a.m.

**FIRESIDE CHAT WITH STAN MAGIDSON**

Stan Magidson, Chair of the Canadian Securities Administrators, will give his unique perspective on the key regulatory risks and issues of the day, such as adapting regulation to align with innovation and evolving markets, enhancing investor safeguards, the regulation of ETFs in Canada, broadening diversity disclosures, total cost reporting, and ESG. What is the path forward for fostering stability and confidence in this ever-shifting environment?

[Andy Mitchell](#), President and CEO, IFIC

[Stan Magidson](#), LL.M, ICD.D, Chair, Canadian Securities Administrators and Chief Executive Officer (CEO), Alberta Securities Commission

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10:40 a.m. – 11:00 a.m.

**Morning Networking Break**

11:00 a.m. – 12:00 p.m.

#### LEADERS PANEL

What are the trends industry leaders are paying attention to today as they prepare for tomorrow? Listen to our panel of leaders discuss the macroeconomic environment, how the evolution of business models can meet the future needs of investors, value creation in an increasingly competitive environment, and growing data, AI, and digital capabilities to build efficiencies and enhance the investor experience.

#### Moderator:

[Goshka Folda](#), President and CEO, Investor Economics | Global Head of Research, ISS Market Intelligence

#### Panelists:

[Kathy Bock](#), Principal, The Vanguard Group | Managing Director, Vanguard Investments Canada | Regional Business Head, Americas

[Neal Kerr](#), Head, Scotia Global Asset Management & President, 1832 Asset Management L.P.

[Carol Lynde](#), President and CEO, Bridgehouse Asset Managers

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Investor  
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12:00 p.m. – 12:45 p.m.

#### Buffet Lunch

12:45 p.m. – 1:10 p.m.

#### INTERNATIONAL SUSTAINABILITY STANDARDS BOARD – KEY DEVELOPMENTS AND IMPLICATIONS

Paul Feetham, a leader in ESG reporting and regulatory standards, will provide an overview of the International Sustainability Standards Board's reporting standards. He will compare the ISSB standards with other domestic and global standards, explain their relevance to investors, and highlight next steps in the Canadian financial context.

[Paul Feetham](#), Partner, Capital Markets and Accounting Advisory Services, PwC Canada

1:10 p.m. – 1:25 p.m.

#### IFIC CEO REMARKS

[Andy Mitchell](#), President and CEO, IFIC

1:25 p.m. – 2:35 p.m.

#### ADVICE PANEL

As the pace of change in the financial sector continues to accelerate, our advice panel will consider the factors reshaping advice and wealth management today, including the influence of regulation and the new SRO, new technologies, the rise of ESG investing and the challenges and opportunities posed by demographic changes. How will the industry meet changing investor expectations amid increasing competition, rising inflation, and fluctuating market conditions?

#### Moderator:

[Bill Donegan](#), Senior Compliance Consultant, AUM Law

#### Panelists:

[Brittany Bascom](#), Head of Platform & Product, Manulife Securities, Global Wealth & Asset Management, Canada

[Jonathan Durocher](#), President, National Bank Financial Wealth Management

[Riley Etheridge Jr.](#), President, North American Wealth Management Client Group, Capital Group

[Karen McNally](#), Vice President, Head of Investment Solutions, RBC Global Asset Management

2:35 p.m. – 2:55 p.m.

#### Afternoon Networking Break

2:55 p.m. – 3:55 p.m.

#### INTERNATIONAL REGULATIONS PANEL

This expert panel will delve into broad, sweeping regulatory trends we are seeing across the globe, such as approaches to fee disclosure, settlement cycles, the impact of regulating technology, cybersecurity, and social media, access (or not) to alternative investments, and industry's/regulators' capacity for more regulatory change. What can we learn as we turn the lens back on Canada and what is the impact on Canadian investors and the industry?

#### Moderator:

[Judy Goldring](#), President and Head of Global Distribution, AGF Management Ltd.

#### Panelists:

[Shalomi Abraham](#), Senior Vice-President | Head of Legal - Canada | Assistant General Counsel - Americas, Invesco Canada Ltd.

[Sarah A. Bessin](#), Deputy General Counsel — Markets, SMAs & CITs, Investment Company Institute (ICI) USA

[Jonathan Lipkin](#), Director of Policy, Strategy and Innovation, The Investment Association (IA) United Kingdom

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3:55 p.m. – 4:40 p.m.

#### CLOSING KEYNOTE

World-renowned speaker Hamza Khan will inspire you with this talk about unlocking and sustaining resilience, particularly during times of volatility, uncertainty, and complexity. He will challenge you to rethink conventional approaches to optimizing productivity and equip you with real-world best practices that promote lasting well-being to create a productive workplace.

[Hamza Khan](#), Future of Work and People-First Leadership Expert | Bestselling Author

4:40 p.m. – 4:45 p.m.

CLOSING REMARKS

[Bruce Sellery](#), Business Journalist | Bestselling Author of Moolala

4:45 p.m. – 6:30 p.m.

Cocktail Reception