Mindpath
Creating New Paths To Learning

Earn up to 6.0 CE Credits

From Surviving to Thriving:
Strategies & Products for the Risk Averse, Yield Hungry Investor

Conference Chair
Michael Nairne
President & Chief Investment Officer
Tacita Capital Inc.

Opening Keynote Speaker
Dan Richards MBA
President
Strategic Imperatives

Keynote Speaker
George Hartman MBA
Founder & President
Market Logics Inc.

Dan Bastasic
Vice President Investments
Mackenzie Financial

Ryan Fitzgerald
Investment Analyst
CI Investments

Kurankye Sekyi-Otu
President
Soho Financial Services Inc./
Polar Securities

Monday, May 11, 2009 ~ Mississauga Convention Centre

Actionable Solutions for Advisors

Unprecedented market volatility and portfolio losses over the past year have been wreaking havoc on advisors and their clients. Advisors are looking for answers, solutions and products to assure and retain their client base.

At the same time, clients are demanding for action - now. Specifically, they want their advisors to provide them with new strategies and products to protect their assets and reverse their losses.

This one day conference will provide you with the building blocks, tools, strategies and products to help you retain and attract new clients.

Hear from leading industry financial professionals, consultants, investment experts and leading portfolio managers on how best to navigate through stormy markets. Network with your peers. Learn how your industry colleague practices are weathering volatile markets.

Reasons for Optimism

Despite ongoing turmoil in the markets, there are reasons for optimism in Canada:

Solid Growth Projections for 2010

The Bank of Canada is standing behind its prediction of a robust 3.8% growth for the Canadian economy in 2010.

While many market watchers feel this projection is overly optimistic, two noted University of Toronto economists, Peter Dunigan and Steven Murphy agree and are projecting close to the same rate of growth next year as the Bank of Canada, 3.7%.

Strong Canadian Banking Sector

In 2008, the World Economic Forum ranked Canada's banking system as the world's healthiest. Significant is the fact that Canada's banking system is the only one among the G7 nations which did not receive bail outs for any of its banks.

Markets Always Recover

In each year following the last 19 bear markets since 1900, where the average annual loss in the DJIA was 37%, the average rate of recovery the following year was 40%.

Gold Partners

Mackenzie Investments

Polar Securities

Silver Partner

Tacita Capital

* CE Credits

Attend the conference and qualify for up to 6.0 Professional Development CE

Credits from Advocis. Note that most Mind*path* conferences also qualify for IIROC CE Credits.

Safety, Security and Solid Returns

This Mind*path* conference will present educational forums and break-out sessions covering the best investment products to put in front of your clients now.

Learn about such products as:
~ High Yield Common and Preferred Stock Investments
~ Business & Royalty Trusts
~ the new generation of wrap / managed money programs
~ Hedge Funds
~ a revolutionary new online Product Allocation tool

… and much more

Conference Content Will Appeal To:
This conference will appeal to Senior Financial Advisors, Planners and Brokers

Mind*path* Conferences Place A Premium on Education

Mind*path* conferences bring together leading industry experts, consultants and investment managers in a format designed to maximize the learning experience for attendees.

Hear about the latest investment strategies and products at this highly interactive educational conference. Interact directly with leading investment portfolio managers.

Learn about the today's best return investment products which your clients are demanding.

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www.Mind*path*.ca

Mind*path*'s Principals Are Financial Industry Veterans

Mind*path* financial conferences are content-driven by industry professionals.

Two of Mind*path*'s principals, Don Bridgman and Daniel Tutton, are financial industry veterans who bring a combined total of nearly 50 years experience in the financial services sector to the company.

Don Bridgman brings over 28 years of experience in the financial services industry to the company.

Don has been an advisor, a senior marketing and sales executive, an industry consultant, a public speaker, a conference manager and workshop facilitator, as well as a trainer and performance coach with unique expertise in personal strategic planning. He currently co-owns and manages one of the largest branches of a leading Canadian wealth management firm.

Currently he serves as Vice Chair of the McMaster University Pension Trust Committee.

Daniel Tutton, President, is a nineteen year veteran of the financial services industry. Previously, Dan served as Senior Vice President of one of Canada's leading financial services companies. He has been involved with educational conferences and special events throughout his business career.

Mind*path* CEO Dan Jerred has over 30 years business experience and brings a depth of expertise in the creation and execution of cutting-edge financial conferences. He has worked in senior capacities with several of Canada's leading financial conference companies before becoming CEO of Mind*path*.

Advisors Find Mind*path* Conferences Time Well Spent

Advisors have told us time and time again that they appreciate the independent, third party education they receive, the interactive nature of the format and that Mind*path* conferences are among the best run in the industry. This is why many advisors are repeat attendees at Mind*path* conferences.

"Excellent - new knowledge base of information. Cutting-edge. Great speakers for the most part. Good time after each presentation left for discussion. Kept on time. Great venue." ~ **David Lyon, Financial Advisor, Dundee Private Investors**

"Excellent speakers covering many different aspects of the subject matter. Excellent time for our Q&A." ~ **L. John Wilson, Financial Planner, Equity Associates**

"I felt it was well organized and well worth my investment in time." ~ **Anthony Mascioni, President, Mascioni Financial**

"All the speakers and topics were terrific - very complimentary." ~ **Nancy Griffin, Investment Advisor, Blackmont Capital**

"Excellent – I found the speakers were focused and gave details with concrete examples. Very productive 2 days." ~ **Brenda Bartlett, Chief Operating Officer, PWL Capital Inc.**

PROGRAM AGENDA

8:40 AM Welcome / Introductory Comments from Mind*path* and Conference Chair, **Michael Nairne**, President Tacita Capital

8:45 – 9:45 AM ~ Opening Keynote Presentation: "Tough Times to Good Times"

Opening Keynote Speaker
Dan Richards MBA
President
Strategic Imperatives

Canada's leading authority on investor sentiment and on what advisors should do to move their business forward in all markets, good and bad, Dan Richards will draw on elements of his popular "Tough Times to Good Times" workshop series.

9:45 – 10:00 AM ~ Morning Refreshment & Networking Break

10:00 – 10:30 AM ~ Corporate Bonds Presentation

Dan Bastasic
Vice President Investments
Mackenzie Financial

Investment grade and high yield corporate bonds currently represent an unprecedented opportunity for high yields and capital appreciation when the inevitable recovery arrives. Conservative equity investors should consider "moving up the capital structure" to lower their risk and be "paid to wait", in case the recovery takes longer than past cycles.

10:30 – 11:00 AM ~ Product Allocation

Mike Muise
Regional Vice President
Manulife Investments

Topic: Introducing… PRODUCT ALLOCATION…
When Asset Allocation isn't enough.
While asset allocation plays an important role in the wealth accumulation phase of investing, the right mix of investment products for those who require income is necessary to mitigate risk for a sound retirement income plan. This mix of investment products is known as Product Allocation.
In this session you will learn:

- ~ What 3 products need to be part of your clients' retirement plan
- ~ How longevity, sequence of returns and inflation can impact your plan
- ~ What is an RSQ?
- ~ An Overview of Manulife's Online Product Allocation Tool

11:00 – 12 Noon ~ Keynote Presentation

Michael Nairne
President & Chief Investment Officer
Tacita Capital Inc.

Topic: "Building and Marketing Effective High Yield Strategies"

- ~ Learn why most clients love a high yield approach
- ~ Gain insight into the host of asset class options available
- ~ Find out the real reason dividend paying stocks outperform
- ~ Discover how to integrate high yield strategies into your asset mixes
- ~ Learn how to avoid the pitfalls of high yield investing
- ~ Discover how to communicate effectively with clients about high yield options

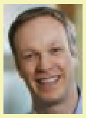
12:00 – 1:00 PM ~ Event Luncheon

1:00 – 1:45 PM ~ The Search for Yield: Overview of the Best High Yield Asset Classes Available Today

Ryan Fitzgerald
Portfolio Manager & Investment Analyst
CI High Income Fund

Topic: The corporate bond opportunity is well known today, however, there are a number of other asset classes which offer high yields today including REITs, Business Trusts, Royalty Trusts, High Yield Common & Preferred Shares and Master Limited Partnerships. Hear about these products during this session.

1:45 – 2:30 PM ~ Hedge Funds Presentation



Paul Mayer
Vice President
Polar Securities Inc.

Kurankye Sekyi-Otu
President
Soho Financial Services Inc.
representing Polar Securities

Hedge Funds have proven themselves to produce uncorrelated returns as well as reduce portfolio volatility. In this session you will gain an overview of hedge funds and learn why not all hedge funds are created equal. Hear about the myths and realities of hedge funds as well as why & how the best hedge managers consistently out-perform the market.

2:30 – 2:45 PM ~ Afternoon Refreshment & Networking Break

2:45 – 3:30 PM

Garnet Anderson Vice President, Portofolio Manager, Tacita Capital
Topic: Tacivest Customized Portfolio Management Program

3:30 – 4:00 PM

Nilesh Patel
Regional Vice President
Manulife Investments
Topic: Income Plus 202, advanced strategies for the use of GMWB's

4:00 – 5:00 PM ~ Topic: "Advising In Tough Times: Practical Solutions for Dealing With Client Anxiety"

George Hartman
MBA, Founder & President
Market Logics Inc.

Including:

- ~ how to respond effectively to client concerns, angst and frustration
- ~ 10 things you can do right now to retain your clients
- ~ surviving to thriving: putting your practice back on the fast track to growth

4:45 PM ~ Business Card Draw for a GPS Car Navigation System

5:00 – 6:00 PM ~ Networking Cocktail Reception

CONFERENCE LOCATION

Mississauga Convention Centre
75 Derry Road West, Mississauga, ON L5W 1G3

Tel. 905.564..1920 Toll-Free: 1.877.766.4613

Registration Form

Important Note

Conference content is designed to meet the information and education needs of Senior Financial Advisors, Planners and Brokers as well as investment analysts.

Conference Fee:

$149.00 Per Delegate + GST = **$156.45**

Group Discounts
Bring 3 or more colleagues from the same firm and branch and save 15%. Group rate: $126.65 + GST = **$133.00**

Yes I would like to register the following people from my firm:

Delegate Name (please print name in full) ________ Title ________

Delegate Name (please print name in full) ________ Title ________

Delegate Name (please print name in full) ________ Title ________

Delegate Name (please print name in full) ________ Title ________

Delegate Name (please print name in full) ________ Title ________

Total number of delegates:

____ @ ________ + GST = ________

Company Name ________

Address ________

City Province Postal Code ________

Phone Fax # eMail Address(es) ________

Method of Payment
☐Cheque ☐VISA ☐M/C ☐AMEX

Card Holder's Name: ________
Card Number: ________
Expiry Date: ________
Signature: ________
Today's Date: ________

How to Register

You may register in one of the following ways:

1. **Register Online**
   Register online by clicking **here**

2. **Register by Fax**
   By faxing the completed registration form toll-free to 1.866.244.9837

3. **Register by Mail**
   Send completed registration form and cheque to Mind*path* corp.
   60 St. Clair Ave. East, Suite 908
   Toronto, ON M4T 1N5

4. **Register by Phone**
   Call Allan Clemmens at 416.929-MIND (6463) ext. 225 or Gabriel Tait ext. 223
   Toll Free 1.877.929.6463