



The ETF Conference

Growing Your Book with Leading Edge ETF Information, Research and Products



Earl Bederman
President
Investor Economics



Mark Yamada
President & CEO
PUR Investing



John de Goey
Investment Advisor
Burgeinvest Bick Inc.



Howard Atkinson
President
Horizons Exchange
Traded Funds



Brooke Thackray
Horizons AlphaPro &
Author, 2010 & 2011
Investor Guides



Kevin Gopaul
Chief Investment Officer
Global Structured Investments
BMO Asset Management

Conference Partners



Tuesday, October 5, 2010 ~ Novotel Toronto North York Hotel

ETFs De-Mystified to Help Advisors Expand their Books

ETFs are a complex and rapidly growing asset class.

Attend this one day conference and learn the ins & outs of ETFs and how they can help you grow your book.

ETFs Growing Exponentially

According to TMX Group Inc., the total number of assets in Canadian ETFs as of January 31 reached \$ 34.7 Bn, an increase of nearly 60% from the \$ 21.9 Bn figure of a year earlier.

Further, the number of ETFs products grew from 85 in early 2009 to 137 in January 2010, with 16 new listings in this month alone.

The average annual compound growth of ETFs in the Canadian market over the past five years has been 30%.

And perhaps most telling, ETF trading now accounts for a very significant 16% of all equities trading in Canada.

The Need for Advisor Education

The range of ETF products is wide, complex and growing almost daily.

Advisors are being inundated with a bewildering array of ETF products, and information. Many advisors want to catch the ETF wave but don't know where to start.

Register today for this leading-edge Mindpath conference and learn how you can leverage this fast growing asset class into new business and assets.

Industry Leading Experts to Present

Hear From Industry Leading ETF Experts, Advisors, Consultants and Product Providers on:

- ~ the latest ETF research
- ~ ETF market analyses
- ~ product overview
- ~ interactive discussion panel with key ETF Fund Cos.

...and much more

Plus – Learn First-Hand about ETFs from our Advisor Discussion Panel!

Mindpath Conferences Emphasize Interaction and Education

Mindpath conferences emphasize learning through participation and interaction.

Generous Q&A / discussion periods with leading industry professionals facilitate the learning process.

A premium is placed on delegates having access to speakers at Mindpath conferences and forums.

Industry experts are available to answer your questions & concerns directly.

This Conference Will Appeal to...

This unique educational event will appeal to senior Investment Advisors and Securities Brokers as well as Financial Advisors looking to become IIROC advisors.

Past Attendees Have Spoken Highly About Mindpath Conferences

"Quality speakers who were willing to answer all questions with their insight in a candid and honest way." ~ **David West, Berkshire Securities**

"Excellent conference with great speakers. Excellent planning... the whole day was just great. Thank you very much. I learned a lot." ~ **Lisa Chew, BMO Bank of Montreal**

"Excellent. One of the best conferences from a learning point of view I have attended. You could see the focus here was on education and presenting different points of view." ~ **Chris Edwards, Assante**

"Very good and I enjoyed the unique format of the conference. Have given positive feedback to colleagues who could not attend." ~ **Susan Yao, CIBC Imperial Service**

Outside-the-Box Thinking

Mindpath is a unique educational conference company for the financial services industry. We offer financial education and top speakers on topics which no other conference company provides.

The goal of Mindpath conferences is to bring 'outside-the-box' thinking and leading-edge content to financial advisors, planners, brokers and investment advisors.

*CE Credits

Note that CE Credits offered at Mindpath Conferences are Professional Development Credits from Advocis through the CLU Institute. Most Mindpath events also qualify for IIROC CE Credits. Mindpath is available to help facilitate the IIROC CE Credit approval process with attending advisors through their professional development departments.

Mindpath's Principals Are Financial Industry Veterans

Mindpath financial conferences are content-driven by industry professionals.

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

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.

Don Bridgman is also a principal of Mindpath and brings over 28 years of experience in the financial services industry to the company. He 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.

As a result, Don remains close to the information and education needs of advisors on a daily basis resulting in topical, relevant and up-to-date programs for Mindpath educational conferences.

Mindpath 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 Mindpath.

Some of the Past Organizations Which Have Attended Mindpath Financial Conferences

- ~ AGF Management Limited
- ~ Ajax Financial Planning
- ~ Arca Financial
- ~ Assante Capital Management
- ~ BMO Nesbitt Burns
- ~ Bick Financial
- ~ Braley Winton Financial Group
- ~ Brown Financial & Insurance
- ~ Burgeonvest Securities
- ~ Berkshire Securities
- ~ Burns Financial
- ~ Canaccord
- ~ CIBC Imperial Service
- ~ Claymore Financial
- ~ Credential Financial
- ~ Croft Financial Group
- ~ Desjardins Financial Security
- ~ Dundee Private Investors / Securities
- ~ First Capital Financial
- ~ Flagstone Financial
- ~ Freedom 55 Financial
- ~ FundEx Investments
- ~ Industrial Alliance
- ~ ING Wealth Management
- ~ Investment Planning Counsel
- ~ Keybase Financial
- ~ Laurentian Financial Services
- ~ Manulife Financial
- ~ MDK / Child Financial Advisors
- ~ Partners In Planning
- ~ Polson Bourbonniere
- ~ Power Financial
- ~ Raymond James
- ~ Richardson Partners Financial
- ~ Russell Investments
- ~ Scotia McLeod
- ~ Stonegate Private Counsel
- ~ Talisman Investment Planning
- ~ TD Asset Management
- ~ TE Wealth
- ~ Tipper Financial
- ~ Turner Financial
- ~ Wellington West Financial

PROGRAM AGENDA

8:30 AM ~ Welcome Remarks from Mindpath, Introduction of Opening Speaker

8:45 – 9:30 AM



Earl Bederman
President
INVESTOR ECONOMICS
consultants to the
financial services industry

Topic: 'Canada's Changing Wealth Market Landscape: 'Prospects and Possibilities for Exchange Traded Funds'

His presentation will cover:

- ~ risk avoidance
- ~ increased investor self-reliance
- ~ greater attention to cost and the continuing shift to fee-based advice
- ~ how these trends will set the context for assessing the growth potential for ETFs

9:30 – 9:45 AM ~ Networking Refreshment Break

9:45 – 10:30 AM



Howard Atkinson
President
HORIZONS
EXCHANGE TRADED FUNDS

Topic: "Dispelling Common ETF Myths"
Howard is one of Canada's leading ETF experts and pioneers. His presentation will:

- ~ provide an ETF Market Overview
- ~ dispel five commonly held myths about ETF investing
- ~ discuss future trends in ETF investing

10:30 – 11:15 AM ~ Advisor Discussion Panel



John de Goey
Investment Advisor



Greg Burgess
Portfolio Manager



11:15 AM – 12:00 Noon



Kevin Gopaul, Chief Investment Officer, Global Structured Investments
BMO Asset Management



Exchange Traded Funds

Topic: Alternative Weighting Strategies

Including:

- ~ capitalization, price, revenue and equal weighting strategies
- ~ the construction and benefits of equal weighting

12:00 Noon – 1:00 PM ~ Conference Luncheon

1:00 – 1:30 PM

Greg Jones
Managing Director, Equity Derivatives



Topic: Market Makers Presentation: Liquidity vs Volume

1:30 – 2:00 PM



Mark Yamada
President & CEO
PUR Investing



Topic: 'Egg Management' ~ An ETF Opportunity
Including:

- ~ too many eggs, too few baskets: managing an expanding ETF universe
- ~ when scrambled eggs are not enough: managing volatility with ETFs
- ~ cooking with eggs: combining ETFs with other asset classes

2:00 – 2:15 PM ~ Networking Refreshment Break

2:15 – 2:45 PM



John Youn
Director, BMO ETFs & Global Structured Investments, BMO Asset Management



Exchange Traded Funds

Topic: Practical Strategies using ETFs

Including:

- ~ utilizing ETFs like Institutional Investors: Core Satellite, Blending Active, Indexing
- ~ how to be tactically nimble and combine long term strategic thinking with ETFs

2:45 – 3:15 PM



Brooke Thackray
Horizons AlphaPro & Author, 2010 & 2011 Investor Guides



Topic: ETF Investing

3:15 – 4:00 PM ~ Industry Discussion Panel

4:00 – 5:00 PM ~ End-of-Day Networking Reception and Business Card Draw*

*for a GPS Car Navigation System

CONFERENCE LOCATION

Novotel Toronto North York Hotel

3 Park Home Avenue
Toronto, Ontario M2N 6L3
Tel. 416.733.2929

For directions to the hotel, click [here](#).



Registration Form

Conference Fee - **Register by September 15 and Save!**

Early Bird Pricing / Register by September 15

Early Bird Price: **\$149.00** + 13% HST

After September 15

\$199.00 + 13% HST

Group Discount

Three delegates or more registering from the same branch receive a 10% discount.

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

Delegate Name (please print name in full) Job Title

Delegate Name (please print name in full) Job Title

Delegate Name (please print name in full) Job Title

Delegate Name (please print name in full) Job Title

Total number of delegates:

_____ @ _____ + 13% HST = _____

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 Mail**
Send completed registration form and cheque to Mindpath corp.
60 St. Clair Ave. East, Suite 908
Toronto, ON M4T 1N5
- 3. Register by Phone**
Call Allan Clemmens at 416.929-MIND (6463) ext. 225 or
Toll Free 1.877.929.6463)