PROGRAM AGENDA

present:

The 6th Annual ETF Conference

‘Canada’s Leading Educational Forum for Advisors on Exchange Traded Funds’

Wednesday, November 6, 2019 (half-day) ~ Marriott Courtyard Burlington Hotel
Thursday, November 7, 2019 (full day) ~ Burlington Convention Centre

Conference Chair

Pat Dunwoody
Executive Director
Canadian ETF Association

Day One ~ ‘ETFs and Your Practice’

12:55 ~ Welcome remarks from Mindpath & Pat Dunwoody

1:00 - 1:30 PM ~ Prerna Chandak, Vice President, ETF Product & Strategy

Topic: ‘Understanding the Basics of ETFs’

● understanding ETF basics and assessing what’s right for you and your clients

1:30 - 2:00 PM ~ Michael Greenberg, Vice President, Portfolio Manager, Franklin Templeton Investments

Topic: ‘Portfolio Construction and Risk Management Considerations in Building ETF Portfolios’

2:00 - 2:45 PM ~ ‘Switching to a Fee Based Practice’

● using ETFs to build portfolios
● how fee accounts can become the backbone of advisor practices
● learn the most efficient and effective ways to set up a fee-based practice
● hear about the latest industry norms for setting a competitive Fee Schedule
PROGRAM AGENDA ~ Day One ~ Wednesday, November 6, 2019

2:45 - 3:00 PM ~ Networking Refreshment Break

3:00 - 3:30 PM ~ Camilo Gil, Executive Director, Institutional ETF Services

Topic: ‘De-Bunking Common ETF Myths’

- ETF myths are addressed in this session:
  - liquidity myths
  - market order execution vs bid/ask prices
  - trading myths

3:30 PM ~ Day One Recap

4:30 PM ~ Day One Concludes

Day Two

Thursday, November 7, 2019 (full day)
Burlington Convention Centre

8:20 - 8:30 AM ~ Welcome remarks from Mindpath + Introduction of the Chair

Opening remarks from Pat Dunwoody

8:30 - 9:15 AM ~ Eric Balchunas, Senior ETF Analyst, Bloomberg

Topic: ‘ETFs at 30 ~ Preparing for 2020 and Beyond’

- a review of 2019’s main industry developments; recap flows, product trends & performance
- a look ahead to 2020 including portfolio strategies plus what’s in store for the industry and what it means for you & your practice

9:15 – 10:00 AM ~ Michael Cooke, Senior Vice President, Head of Exchange Traded Funds, Mackenzie Investments

Topic: ‘Building Better ETF Portfolios’

- how advisors can select the right ETF building blocks to improve investor outcomes

10:00 - 10:15 AM ~ Networking Refreshment Break

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PROGRAM AGENDA ~ Day Two ~ Thursday, November 7, 2019

10:15 - 11:00 AM ~ 'View from the Top' ~ Panel Discussion featuring ETF Industry Leaders
Panel Moderator

- Daniel Straus
  Head of Research & ETF Strategy
- Michael Cooke
  Sr. VP., Head of ETFs
- Dennis Tew
  Vice President

Panel Discussion featuring ETF Industry Leaders

- the state of financial advice in Canada
- product proliferation ~ how much is too much
- how sector disrupters such as robos are impacting traditional advice giving

11:00 – 11:30 AM ~ Jordan Blain, Director of ETFs ~ Manulife Investment Management

Topic: 'The Case for US mid-Caps with a Multi-Factor Approach'

- how a multi-factor approach in this space can increase the opportunity for outperformance over time

11:30 AM - 12 Noon ~ Bernd Henseler, Managing Director, Solactive Americas

Topic: 'The State of Indexing'

- indexing has undergone an unprecedented arms race in search of better absolute returns, risk-adjusted returns or thematic approaches
- criteria-based methodologies have caught on with advisors & investors
- what are the critical aspects of indexing to consider?

12:00 - 1:00 PM ~ Event Luncheon

1:00 - 1:15 AM ~ Sri Iyer, Managing Director, Head of Systematic Strategies

Topic: 'Using AI and Big Data to Find a Better Yield'

- learn how portfolio managers can utilize key technologies such as Big Data, Artificial Intelligence & Cloud Computing to find new sources of return

1:15 – 1:30 PM ~ James Wang, Analyst, Emerge Capital Management

Topic ‘Next Generation Internet’

1:30 - 1:45 PM ~ Fotios Saratsiotis, President, Pascal Financial

Topic: ‘Empowerment in the Digital Age’
1:45 – 2:30 PM ~ Panel Discussion ~ ‘The Challenges of De-cumulation in a Low Yield World’

Anthony Chouinard  
Vice President  
ETF Strategist  
MACKENZIE Investments

David Wysocki  
Managing Director  
HARVEST Investments

• how to increase your client’s retirement income using various income producing ETFs

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2:30 - 2:45 PM ~ Networking Refreshment Break

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2:45 – 3:05 PM ~ Daniel Straus, Head of Research & ETF Strategy

Topic: ‘ETFs in Canada ~ A Macro View’

• the evolving Canadian ETF market  
• Canadian ETF differentiators vs U.S. & Globally  
• 2020 and beyond ~ a look into the crystal ball

3:05 – 3:30 PM ~ Deborah Frame, President & Chief Investment Officer

Topic: ‘Outsourcing the Building and Managing of ETFs’

• how client portfolios for different objectives  
• topics include taking a tactical approach, portfolio rebalancing & more  
• which products an ETF strategist uses and why

3:30 – 4:15PM ~ ‘Advisor Discussion Panel’ ~ featuring advisors who are embracing ETFs

Kim Inglis  
Financial Advisor,  
Associate Portfolio Manager  
RAYMOND JAMES

Konrad Kopacz  
Portfolio Manager &  
Investment Advisor  
ECHELON WEALTH PARTNERS

Michael Salisbury  
Portfolio Manager  
RAYMOND JAMES

4:30 - Closing Comments

4:40 - 5:30 PM ~ Networking Reception
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