

PROGRAM AGENDA



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present:

The 6th Annual ETF Conference

'Canada's Leading Educational Forum for Advisors on Exchange Traded Funds'

Wednesday, November 6, 2019 (half-day) ~ Hilton Garden Inn 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*'



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Investments

- 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 ~ **Don Bridgman**, Principal, Mindpath Conferences



Topic: '*Switching to a Fee Based Practice*'



- how fee accounts can become the backbone of advisor practices
- learn the most efficient and effective ways to set up a fee-based practice

PROGRAM AGENDA ~ Day One ~ Wednesday, November 6, 2019

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

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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



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

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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



David Picton
President & CIO



- 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: *'Manulife Multi-Factor ETFs'*

- 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 ?



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12:00 - 1:00 PM ~ Event Luncheon

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



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

Session Co-Sponsor



1:15 – 1:30 PM ~ **James Wang**, Analyst, ARK Invest



Topic *'Next Generation Internet'*



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



Topic: *'Empowerment in the Digital Age'*



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

1:45 – 2:30 PM ~ Panel Discussion ~ *'The Challenges of De-cumulation in a Low Yield World'*



Anthony Chouinard
Vice President
ETF Strategist



David Wysocki
Managing Director



- 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



Konrad Kopacz
Portfolio Manager &
Investment Advisor



Michael Salisbury
Portfolio Manager



4:30 - Closing Comments

4:40 - 5:30 PM ~ Networking Reception