

Mindpath's 8th Annual ETF Conference

EVENT SCHEDULE

Announcing Canada's Largest & Most Comprehensive ETF Conference
October 25th - October 27th, 2021

MONDAY, OCTOBER 25TH

BONUS PRE-CONFERENCE DAY

ETFs 101 and Background Information for Conference Topics

9:15am	The Latest ETF Research Introduction by Pat Dunwoody - Executive Director of the Canadian ETF Association (CETFA) Carlos Cardone – Investor Economics	KEYNOTE
10:00am	What to know about ESG – Product Differences & Distinctions and a Due Diligence Check list Mark Webster – BMO Global Asset Management	KEYNOTE
11:00am	Overview to Client Focused Reform (CFR) MODERATOR: Melissa Shin , Editorial Director – Advisor's Edge & Investment Executive PANELISTS: Byren Innes – Jennings Consulting Nelson Cheng – Sterling Mutuals Richard Stone – Stone & Co	PANEL
12:00am	The Role of Index Providers Solactive Perspectives, 2020/2021 reflections, challenges and opportunities heading into 2022	KEYNOTE

EXTRA ON DEMAND SESSIONS

ETFs – How do they work? How to buy and sell ETFs – ETF Myths Debunked Megan France – CIBC Capital Markets	KEYNOTE
Insights from a blogger's journey through the world of ETFs Dale Roberts, Chief Disruptor – Cut the Crap Investing	KEYNOTE

9:00am–9:05am	Mindpath's 8th Annual ETF Conference Welcome Don Bridgman, Mindpath CEO	
9:05am–9:15am	Welcome from CETFA (The Canadian ETF Association) Michael Cooke , CETFA Chair	
9:15am–9:50am	10 ETF Shockers Eric Balchunas , Sr. ETF Analyst – Bloomberg Intelligence	KEYNOTE
9:50am–10:40am	ETF Thought Leaders Discussion/ C-Suite Panel MODERATOR: Pierre Daille – Advisor Analyst PANELISTS: Kim Shannon – Sionna Investments John Wilson , President – Ninepoint Partners Lisa Langley , President – Emerge Canada Pauline Shum Nolan – Wealthscope	PANEL
10:40am–10:55pm	Break	
10:55am–11:35am	The Canadian Energy Sector – The Opportunity of the Decade? Eric Nuttall , Sr. PM – Ninepoint Partners	KEYNOTE
11:35am–12:15pm	Innovation/Disruption ETFs Panel MODERATOR: Yves Rebetez – Credo Consulting PANELISTS: Darim Abdullah , ETF Strategist – INVESCO Tiffany Zhang – National Bank Financial Ben Johnson , Director of Global Research – Morningstar Lisa Langley , President – Emerge Canada	PANEL
12:15pm–1:00pm	Lunch break - stretch your legs, grab some food and if you must work, check out our sponsors virtual booths	
1:00pm–1:40pm	Panel on Client Focused Reforms (CFR) – How advisors can use them to show their value proposition MODERATOR: Pablo Fuchs , Globe Advisor Editor – The Globe and Mail PANELISTS: Paul Carney , President – Pivotal Financial Partners Sean Shore – Legal Compliance Chris Enright , President – Aligned Capital Partners	PANEL
1:40pm–2:20pm	The Outlook for Inflation and ETFs to Protect from Inflation Risk Alfred Lee , BMO Global Asset Management	KEYNOTE
2:20pm–2:35pm	Break	

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TUESDAY, OCTOBER 26TH

DAY 1

2:35pm–3:15pm **ESG – Background/Overview/Rating Services – How to incorporate ESG into your Portfolio Construction** PANEL

MODERATOR: [Clare O’Hara](#), Report on Business – Globe and Mail

PANELISTS: [Reid Baker](#) – Fundata | [Jennifer Nerlich](#) – Solactive AG | [Deborah Debas](#) – Desjardin Wealth | [Kathleen Anderson](#) – Clearbridge Investments/Franklin Templeton

3:15pm–3:55pm **Index Considerations for Factors and Thematics** KEYNOTE
[Stephane Mattatia](#) – MSCI on Thematics | [Hitendra Varsani](#) – MSCI on Factors

3:55pm–4:25pm **The Place and Role of Real Estate and Infrastructure in Portfolio Construction** KEYNOTE
[Lee Goldman](#), Portfolio Manager – CI Global Asset Management

4:25pm–4:30pm **Closing Remarks**
Don Bridgman, Mindpath CEO

WEDNESDAY, OCTOBER 27TH

DAY 2

9:00am–9:05am **Mindpath's 8th Annual ETF Conference Day 2 Welcome**
Yves Rebetez, Partner – Credo Consulting

9:05am–9:40am **The Canadian ETF Market – “State of the Union” – Key Developments that you Need to Know to stay up to date** KEYNOTE
[Daniel Straus](#), Director of ETF Research and Strategies – National Bank Financial

9:40am–10:00am **A Tactical Playbook for Portfolio Management & Construction** KEYNOTE
[Stephen Lingard](#), Sr. Portfolio Manager and Head of Research for Multi-Asset Portfolios – CI Global Asset Management

10:00am–10:40am **Economic and Investment Outlook** KEYNOTE
[Greg Taylor](#), CIO – Purpose Investments | [Michael Gregory](#), Deputy Chief Economist & Head of US Economics – BMO Capital Markets

10:40am–10:55am **Break**

10:55am–11:15am **Traditional Fixed Income is Broken – Four Ways To Improve a Bond Fund** KEYNOTE
[Etienne Bordeleau-Labrecque](#), VP & Portfolio Manager – Ninepoint Partners

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11:15am–11:35am	Blockchain and The Future of Money and Investing Alex Tapscott , Managing Director, Digital Asset Group – Ninepoint Partners	KEYNOTE
11:35am–12:15pm	Income Generating ETFs – How to get an Adequate Yield without taking on Undue Risk Chris Heakes , Portfolio Manager – BMO Asset Management	KEYNOTE
12:15pm–1:00pm	Lunch break - stretch your legs, grab some food and if you must work, check out our sponsors virtual booths	
1:00pm–1:40pm	Alternatives – Moving Away from Zero MODERATOR: James Burrton , President – The Canadian Alternative Assets and Strategies Association (CAASA) PANELISTS: Craig Basinger – Purpose Investments Robert Wilson – Picton Mahoney Asset Management John Wilson , Co-CEO & Managing Partner – Ninepoint Partners	PANEL
1:40pm–2:20pm	Income Generation – A Tactical Asset Allocation Discussion Craig Basinger , Chief Market Strategist – Purpose Investments Sandy Liang , Partner and Portfolio Manager – Purpose Investments	KEYNOTE
2:20pm–2:30pm	Break	
2:30pm–2:50pm	Active Fixed Income Through the Lens of a Hedge Fun Specialist Phil Messman , Head of Fixed Income – Picton Mahoney	KEYNOTE
2:50pm–3:20pm	Winners and Losers in Factor Land MODERATOR: Daniel Straus , Director of ETF Research & Strategy – National Bank Financial PANELISTS: Laurent Boukobza – Mackenzie Investments Chris Heakes – BMO Global Asset Managers Chris Cullen – Brompton Funds	PANEL
3:20pm–4:20pm	Going Global in 2022 – International/Emerging Markets/China et. al MODERATOR: Yves Rebetez – Credo Consulting PANELISTS: Stephen Jenkins , Portfolio Manager and co-CIO – Sionna Investment Managers Mark Cho – Martin Currie/Franklin Templeton Stacey Steinberg – Mackenzie Investments	PANEL
4:20pm	Closing Remarks Don Bridgman, Mindpath CEO	