



**SCHEDULE**

TIME	TOPIC	SPEAKER
7:00 a.m.	Registration/Information Desk Open	
7:00 – 8:00 a.m.	Breakfast with Sponsors and Exhibitors	
8:00 – 9:15 a.m. Institute CE 1.5	<p><b>Wealth Management, The Exceptional Path (Through the Eyes of the Client)</b></p> <p>The good news is that investors are satisfied, and they're loyal. The bad news is that it's simply not enough, not if you want to deliver an exceptional client experience that truly sets you apart and drives significant growth. In this session Julie Littlechild, Founder and CEO of Absolute Engagement will share the latest Canadian investor research from the Investments &amp; Wealth Institute that examines and quantifies the drivers of client engagement and the characteristics of an exceptional advisor. You'll walk away with a clear plan to take stock of your existing client experience and transform clients from being 'merely satisfied' to 'profoundly engaged'.</p>	 <b>Julie Littlechild</b> <i>Founder, Absolute Engagement</i>
9:15 – 9:30 a.m.	Break with Sponsors and Exhibitors	
9:30 – 10:30 a.m. Institute CE 1 CFP® CE 1	<p><b>Global Investment Outlook and Best Practices</b></p> <p>The world's financial markets are facing uncertainty as central banks reconsider monetary policy, countries reconsider their trade policies, and investors brace for impact. Join Scott Welch as he separates the actionable investment signals from the noise, and explains his best practices for selecting investment managers.</p>	 <b>Scott Welch</b> <i>CIO, Dynasty Financial Partners</i>
10:30 – 10:45 a.m.	Break with Sponsors and Exhibitors	
10:45 a.m. – 12:00 p.m. Institute CE 1.5 CFP® CE 1.5	<p><b>How Advisors Work with Tax Practitioners to Add Value for Clients</b></p> <p>We are experiencing changes to tax rules across both sides of the border. This has resulted in far greater complexity, requiring careful navigation, planning and specialist advice to protect the wealth of family owned businesses.</p> <p>By way of introduction, we will provide an update on the current Canadian income tax rates. We will then consider planning opportunities for owners of Canadian controlled private companies, as well as the income splitting landscape after TOSI.</p> <p>For the second part of the session, we will provide an update on cross-border US and Canadian estate planning post US tax reform and look at Canadian family members holding US assets. Lastly, we will cover planning considerations for Canadians buying a US vacation property.</p>	 <b>Kaye Bland,</b> <i>Partner, PwC</i>   <b>Sathees Ratnam,</b> <i>Partner, PwC, Tax</i>

## SCHEDULE (CONT.)

TIME	TOPIC	SPEAKER
12:00 – 12:45 p.m.	Lunch	
12:45-1:45 p.m. <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px 0;">Institute CE 1</div> <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px 0;">CFP® CE 1</div>	<p><b>Retirements and Its Discontents: Why We Won't Stop Working, Even if We Can</b></p> <p>Retirement has become an increasingly complex topic. This is in large part because we are living longer now than we have in all of human history. In her talk, University of Toronto Professor Michelle Silver invites you to rethink your perceptions about aging and retirement. She discusses retirement from its early policy roots to the social phenomena it has become with a focus on implications for people whose personal identity has always been closely intertwined with their work. Her talk makes the point that aging is different today from the not so distant past while exploring how to make the most of retirement. Drawing from recent research she presents four key strategies for retirement, weaving in examples from CEOs, Elite Athletes, Physicians, and Academics she has interviewed.</p>	 <p><b>Michelle Silver,</b> Associate Professor of Sociology at the University of Toronto</p>
1:45-2:00 p.m.	Break with Sponsors and Exhibitors	
2:00-3:00 p.m. <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px 0;">Institute CE 1</div> <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px 0;">CFP® CE 1</div>	<p><b>Lessons from 500 Years of Annuity Mispricing</b></p> <p>For hundreds of years affluent consumers have purchased annuities to finance and generate income during their golden years. And, possibly for just as long annuities have been linked to controversy and apprehension by both buyers as well as manufacturers. In this (entirely new) presentation Professor Milevsky examines the vital role of annuities through the prism of financial history. Along this journey he advocates for a return to a bygone era of annuity simplicity, transparency and pricing rationality. If you are in the business of retirement income planning, this presentation will help you justify and position annuities—with their guaranteed lifetime income—not as a reckless or expensive bet on interest rates, but as a prudent and natural hedge against longevity risk.</p>	 <p><b>Moshe A. Milevsky</b> Professor of Finance, Schulich School of Business, York University</p>

## DOWNLOAD THE CONFERENCE MOBILE APP!



**Step 1:** Download the Investments & Wealth events app from your app store. You also can access the mobile website:  
<https://crowd.cc/eac19>



**Step 2:** Search for the 2019 **Exceptional Advisor Canada** event within the Investments & Wealth events app and download the event.

Log in to message specific attendees, create your own schedule, and save any presentation notes that you take.

## THANK YOU TO OUR SPONSORS AND EXHIBITORS

Sponsors:



Wealth  
Management



Media Sponsor:

Exhibitor:

MODERN CONCIERGE

Complimentary meeting room wifi login information:  
 Network: institute  
 Password: eac2019!