



**AIMSE**  
**CANADA**

The Next 25 Years

25<sup>th</sup> ANNUAL AIMSE **CANADIAN** CONFERENCE

JANUARY 17-18, 2018 | INTERCONTINENTAL TORONTO CENTRE | TORONTO, ONTARIO

PRELIMINARY PROGRAM

# Welcome

## The Association of Investment Management Sales Executives (AIMSE) welcomes you to the 25<sup>th</sup> Annual Canadian Conference!

For almost 3 decades, AIMSE has been providing investment management sales and service executives:

- ▶ Access to plan sponsors and consultants
- ▶ Professional development tools designed to make you more successful
- ▶ Education

On Wednesday, January 17, we invite you to join us for an evening welcome reception at the Ripley's Aquarium of Canada where you can network with industry peers in a relaxed and informal setting while enjoying one of Toronto's most visited attractions.

On Thursday, January 18, our full-day conference begins. We will kick off the day with an insightful keynote address by Eric Barker, international speaker and bestselling author who will challenge you on the definition of success. For our 25th anniversary, this year's sessions include more access to plan sponsors and consultants with two panel discussions featuring experienced plan sponsors and senior consultants who will share their view on the future of institutional investment management and two roundtable sessions where representatives from the plan sponsor and consulting communities will provide insight into their firm and search trends, as well as an industry update from Greenwich Associates, and more! Registration is available on the [AIMSE website](#).

*I look forward to seeing you in Toronto and celebrating 25 years!*

Sincerely,

**Jay A. Wiltshire, CFA**

Greystone Managed Investments Inc.  
Conference Chair



**AIMSE**  
**CANADA**

25

The Next 25 Years

# Preliminary Agenda

Speakers listed are confirmed to date and subject to change



## WEDNESDAY JANUARY 17, 2018

5:30 pm – 8:00 pm **Opening Cocktail Reception**

Ripley's Aquarium

## THURSDAY JANUARY 18, 2018

7:30 am – 8:00 am **Breakfast**

8:00 am – 8:15 am **Welcome & Introduction**

**Jay Wiltshire, CFA** | AIMSE Canada Conference Chair  
Vice President, Institutional Relationships  
Greystone Managed Investments Inc.

**Kim Woolverton, CFA** | AIMSE Canada President  
Senior Business Development Manager  
Aberdeen Standard Investments

8:15 am – 8:30 am **Now a Word from Our Sponsors**

8:30 am – 9:30 am **Keynote Address by Eric Barker** | *Barking Up the Wrong Tree*

Much advice about achievement is logical, earnest... and downright wrong. In *Barking Up the Wrong Tree*, Eric Barker reveals the extraordinary science behind what actually determines success. You'll learn:

- 】 Why valedictorians rarely become millionaires
- 】 How your biggest weakness might be your greatest strength
- 】 Lessons about cooperation from gangs, pirates, and serial killers
- 】 The Navy SEAL secret to "grit"
- 】 How to find work-life balance from Genghis Khan, Albert Einstein, and Spider-Man

By looking at what separates the extremely successful from the rest of us, we learn how to be more like them—and discover why it's sometimes good that we aren't.

9:30 am – 10:30 am **Plan Sponsor Panel**

Remember when Canadian Equities made up the bulk of a Canadian Pension Fund's equity allocation. Remember when the foreign content limit was a mere 20%. Remember when Pension Funds in Canada shied away from Real Asset investing for several years. Remember when all you needed to get into Financial Services was your Canadian Securities Course and now a CFA doesn't even guarantee you a spot.

Times have changed and we have moved to a world of mainstream Alternative Investing, global focus and record numbers of CFAs populating the world. We have lined up a roster of former Canadian

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# Preliminary Agenda

Thursday, January 18 | 9:30 am – 10:30 am | Plan Sponsor Panel *continued*

Pension C-Suite investors who are still very active on several Investment Committees of many of Canada's premier Pension Funds. They will take us back through time and share lessons learned along with their insights for you as investment management marketers to be on top of your game.

**Moderator** **Angela Vidakovich, CIM**  
Director, Marketing & Client Service  
Brookfield Investment Management

**Speakers** **Emilian Groch**  
Corporate Director  
Provident10

**David Long**  
Senior Vice President & Chief Investment Officer  
Healthcare of Ontario Pension Plan

**Ronald Queck, CFA**  
Chief Investment Officer  
Healthcare Employee Benefits Manitoba

10:30 am – 11:00 am **Refreshment Break with Sponsors & Exhibitors**

11:00 am – 12:30 pm **Consultant Roundtables**

A hallmark of the AIMSE conferences, the consultant roundtables are always one of the most popular sessions. Join us for an interactive and candid discussion with leading consultants from global and Canadian firms. Come with your questions and hear top consultants share their thoughts on what investors are doing, which asset classes are in demand and how to get (and keep) your products on the radar. There's no formality — just you and your fellow marketers discussing manager search activity, organizational updates, new trends in the consulting industry, how best to communicate with these influential consultants and more. You'll gain great insights from a wide array of top consulting firms and begin the process of building relationships with these key people in an intimate and interactive setting. Don't miss this opportunity for you and your peers to have a direct dialogue with consultants on the key topics and issues confronting marketing professionals today.

**Moderator** **Sherry-Lee Gregory**  
Vice President, Consultant Relations  
Franklin Templeton Institutional

**Speakers** **Joe Cerullo**  
Senior Consultant  
Segal Rogerscasey Canada

**Howard Chao, CFA, FCIA, FSA**  
National Investment Practice Leader — Canada  
CONDUENT

**Linda Do**  
Senior Investment Consultant  
Willis Towers Watson

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# Preliminary Agenda

Thursday, January 18 | 11:00 am – 12:30 pm | Consultant Roundtables *continued*

**Speakers** **Ross Dunlop, CFA, FCIA, FSA**

(continued) Partner  
Ellement Consulting Group

**Darin Eddy, CFA**

Associate Actuarial Consultant  
Morneau Shepell Ltd.

**Ryan Kuruliak, CFA, CIM, RPA**

Senior Vice President  
Proteus

**Calum Mackenzie**

Partner  
Aon Hewitt

**Chris Shepler, CFA**

Senior Director  
Cambridge Associates, LLC

12:30 pm – 1:30 pm **Networking Lunch**

1:30 pm – 2:45 pm **Plan Sponsor Roundtable**

This session will give you access to several senior investment professionals at pension plan sponsors from across Canada where you will learn what they are doing, seeing, and expecting from their managers. Don't miss this opportunity to ask questions in a small and intimate setting that has made the roundtables so popular.

**Moderator** **Brad Haughey, CFA**

Director of Global Equities  
Black Creek Investment Management Inc.

**Speakers** **Nicolas Drapeau**

Portfolio Manager, Head of Infrastructure & Private Equity  
BIMCOR Inc.

**Jennifer Grabmann**

Director, Pension Investments  
Emera Inc.

**Debra Granatstein**

General Manager, Private Equity and Infrastructure  
Canada Post Pension Plan

**Asif Haque**

Director, Investments  
CAAT Pension Plan

**Toza Siriski, CAIA, FRM**

Manager, Pension Investments  
Royal Bank of Canada

**Additional speakers coming soon!**

2:45 pm – 3:00 pm **Refreshment Break with Sponsors & Exhibitors**



# Preliminary Agenda



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3:00 pm – 4:00 pm **Consultant Panel**

This session will look back over the last 25 years and highlight changes in the consulting industry, changes in asset class demands, and regulatory changes that have impacted institutional investing. Taking us through the years and what to expect now and into the future will be experienced investment consultants discussing topics from how to successfully partner with consultants as OCIOs as well as in their traditional roles to future asset allocation trends, and the changing investment landscape that our clients face.

**Moderator** **Joyce Hum, CFA**

Vice President, Consultant Relations  
Guardian Capital LP

**Speakers** **Michelle Loder, CFA, CA, CPA, RFP**

Partner, Defined Contribution Solutions  
Morneau Shepell Ltd.

**Dave Makarchuk**

Partner  
Mercer

**Michael G. McMurray, CFA**

Senior Consultant  
Pavilion Advisory Group Ltd.

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4:00 pm – 5:00 pm **Canadian Institutional Market Trends Update with Greenwich Associates**

Greenwich Associates, a research-based consulting firm providing competitive insights to asset managers, will provide us with an update on the key trends in the Canadian institutional marketplace based on their extensive research with the largest tax-exempt funds in the country. Gain insight into issues affecting plan sponsors today and learn which investment strategies are expected to experience allocations in the future so that you can better focus your product development and marketing efforts.

**Moderator** **Kimberley Woolverton, CFA**

Senior Business Development Manager  
Aberdeen Standard Investments

**Speaker** **Davis Walmsley**

Principal  
Greenwich Associates

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5:00 pm **Conference Concludes**

# General Information



## Registration Information

### Deadlines:

- ▶ Early Bird Registration | **December 15, 2017**
- ▶ Registration deadline for inclusion in printed attendee list | **December 22, 2017**
- ▶ Cancellation Refund Request | **January 5, 2018**

### All Exhibitors Must Pre-Register.

Contributions or gifts to AIMSE are not deductible as charitable contributions for federal income tax purposes. However, dues payments are deductible by members as an ordinary and necessary business expense. For clarification on registration policies, please call the AIMSE office at: **703.234.4098**.

**Cheque Payments:** Please print a copy of your registration form and include it with your cheque made payable to AIMSE. Send to the following address:

- ▶ **AIMSE** | 11130 Sunrise Valley Drive | Suite 350 | Reston, VA 20191

**Attendee List:** Your registration must be received by December 22, 2017 for your name to be included in the printed list of attendees. *Attendee registration lists will not be distributed prior to the conference.*

Registration Fees	EARLY BIRD Until December 15	REGULAR After December 15
Single AIMSE Member	<b>\$995 USD</b>	<b>\$1145 USD</b>
Two or more AIMSE Members <i>attending from the same firm</i>	<b>\$845 USD*</b>	<b>\$945 USD*</b>

\*Per AIMSE member

**Must be a current AIMSE member. Remittance accepted ONLY in US currency.**

### Hotel Reservations:

- ▶ **Intercontinental Toronto Centre** | 225 Front Street West | Toronto, ON M5V 2X3

A block of rooms has been reserved for conference participants at the special rate of **\$259 CAD** per night for a single room. To reserve a room, call the Intercontinental Toronto Centre directly at: **1.800.235.4670**. Individuals **MUST** state that they are with the 2018 AIMSE Annual Canadian Conference to receive the group rate.

- ▶ To reserve a room online, please visit: **TBD**
- ▶ The hotel reservation cut-off date is: **December 17, 2017**

**Refund Policy:** Refunds will be granted by AIMSE for requests received in writing by January 5, 2018. An administrative fee of \$250 will be assessed to all refunds. No refunds will be granted after January 5, 2018 but another AIMSE member from your firm may attend in your place. All requests for registration refunds and/or transfers must be made in writing.

# Registration Form



FULL NAME \_\_\_\_\_ BADGE NAME \_\_\_\_\_

TITLE \_\_\_\_\_ FIRM \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIPCODE \_\_\_\_\_ COUNTRY \_\_\_\_\_

PHONE \_\_\_\_\_ FAX \_\_\_\_\_ EMAIL \_\_\_\_\_

NAME OF CONTACT PERSON \_\_\_\_\_

Registration Fees	EARLY BIRD Until December 15	REGULAR After December 15
Single AIMSE Member	<input type="checkbox"/> \$995 USD	<input type="checkbox"/> \$1145 USD
Two or more AIMSE Members attending from the same firm	<input type="checkbox"/> \$845 USD*	<input type="checkbox"/> \$945 USD*

\*Per AIMSE member

Membership Dues	ACTIVE	ASSOCIATE
<i>Please only submit dues only if you are NOT already a current member. Only current members are eligible to attend. If you are unsure of your membership status, please call the AIMSE office at 703.234.4098.</i>	<input type="checkbox"/> \$350 USD	<input type="checkbox"/> \$450 USD

## Payment Information

- Enclosed is my **cheque**, payable to AIMSE (Remittance accepted ONLY in US currency)
- Please **charge** payment to:  VISA  MasterCard  American Express

CARD NUMBER \_\_\_\_\_ EXP DATE \_\_\_\_\_

NAME ON CARD \_\_\_\_\_ SIGNATURE \_\_\_\_\_



### Please return with payment to:

**AIMSE**  
11130 Sunrise Valley Drive, Suite 350  
Reston, Virginia 20191  
FAX: 703.435.4390 | [info@aimse.org](mailto:info@aimse.org)

**Note:** If you are going to register by fax and paying by credit card, please DO NOT also send a hard copy to the office





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**CANADA**

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**ASSOCIATION OF INVESTMENT MANAGEMENT SALES EXECUTIVES**

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