

# 4th Annual Indigenous Trust and Investment Conference and Annual General Meeting

June 1 & 2, 2017

Vancouver Marriott Pinnacle Downtown Hotel

# 80% SOLD!

## Agenda

### DAY 1 - THURSDAY JUNE 1

- 9:00** Board of Directors Introduction  
Gwa'sala-'Nakwaxda'xw Welcome
- 9:30** Reconciliation and Responsible Investing – Panel  
- *Andrea Nemtin, Mark Sevestre, Jason Campbell and Peter Chapman*
- 10:30** Refreshment Break  
Visit the Trade Show and Exhibitors
- 10:45** Break-Out Sessions:  
Lessons Learned in the Development and Implementation of Scholarship Program - *Patty Francis*  
Indigenous Sharing Circle - *Wyatt Arcand*  
Financial Reporting - *Norman G. Grdina*  
Investment Basics - *Steve Smith*
- 12:00** Break-Out Sessions:  
Creating Sustainable Income for Your Community - *Wayne Wilson*  
Evolving Your Investment Policy - *Jean-Philippe Bry*  
Sustainable Economic Development Through Trusts and Investments - *Georgina Villeneuve*  
Trust Basics - *Don Woods, Kathleen Smith*  
Collective Impact: Centering the Power of People - *Gordon Larin*
- 1:00** Annual General Meeting / Lunch
- 2:00** Investment Strategies for Aboriginal Clients  
- *Andrew Mitchell, Colin Aubrey, Alan J. Daxner and Donald Herman*
- 3:00** What to Expect from Your Trust and Investment Providers - *Don Woods, Andrew Hoffman, Jeff Frketch and Jamie Lickers*
- 4:30** NATOA's Meet and Greet  
'Speed Meeting Ice Breaker' - Cocktails, hors d'oeuvres and a chance to win an iPad (hosted by TD Bank)

### DAY 2 - FRIDAY JUNE 2

- 9:00** Honouring Our 10-Year Members and Supporters
- 9:30** Global Equities – The importance of Diversifying Portfolios Outside of Canada - *Colin Ripsman*
- 10:30** Refreshment Break  
Visit the Trade Show and Exhibitors
- 10:45** Break-Out Sessions:  
Education for Passive Investing - *Robert Gill*  
Trust Budgets – How To Make Your Trust Work For You - *Melanie McDonald*  
Investment Advanced – Investing in Good Times - *Lisa Caswell*  
Trials and Tribulations of Starting a Trust - *Wendy Ham*
- 12:00** Break-Out Sessions:  
Trust Advanced - *Georgina Villeneuve*  
The Manager Search Process - Finding "The Most Appropriate Firm" For Your Needs - *Jack Jamieson*  
Youth Involvement – Your Community's Future - *Peguis First Nation*  
A Review of Equity Investment Styles in Canada - *Brian Holland and Spyro Carayannis*
- 1:00** Honouring Our Students – Tony Shirt Award / Lunch
- 2:00** Break-Out Sessions:  
US Withholding Tax Presentation - *Max Reed*  
EDIP Sovereign Wealth Solutions - Growing Assets to Control Your Destiny - *Howard Morry and Gary Kissack*  
Negotiations 101 - *Jamie Lickers and Scott A. Smith*  
Managing Trust Investments that Reduce the Unknown and Better Produce Planned Outcomes - *Andrew Hoffman and Michael Job*
- 3:00** Refreshment Break  
Visit the Trade Show and Exhibitors
- 3:15** Natural Resources – Indigenous Rights - *Panel*



Check back often for updates.  
Agenda is subject to change.

BMO Financial Group

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