



“Be a Part of Your Community’s Future”

May 23-24
2018
 The Banff Centre | Banff, AB

NATOA 5th Annual Indigenous Trust and Investment Conference



PRE-WORKSHOP - TUESDAY, MAY 22, 2018

- 1 pm - 4 pm Reconciliation and Responsible Investment Workshop
- 7:00 pm NATOA Annual General Meeting

DAY 1 - WEDNESDAY, MAY 23, 2018

- 9:00 am Opening Ceremonies
- 9:30 am Business Chemistry
- 10:30 am Break
- 10:45 am Ngai Tahu Charitable Trust
- 11:45 am **Breakout Sessions:**
 - Trust Structures - What Works Best For You And Your Community
 - Trust Basics
 - Investment Basics
 - Youth Engagement
- 12:45 pm Lunch
- 1:45 pm **Breakout Sessions:**
 - Financial Literacy - Youth
 - Beardy Okenasis Band Specific Claims – ‘1885 Rebellion Claim’
 - Reconciliation and Responsible Investments
 - Creating Sustainable Income For Your Community
- 2:45 pm **Breakout Sessions:**
 - US Tax Savings For Indigenous Communities
 - Trust Investments To Work Together To Create Planned Outcomes
 - Indigenous Women - What It Takes To Succeed In Today’s World
 - First Nations Wealth Management Through Good Governance
- 3:45 pm Developing A Prudent Investment Policy
- 4:15 - 6:30 pm 'Speed Meeting' Ice Breaker - Hosted by TD Bank

DAY 2 - THURSDAY, MAY 24, 2018

- 9:00 am Tax Savings For Your Trust
- 10:00 am Break
- 10:15 am **Breakout Sessions:**
 - Trust Advance
 - Implementing Your Values Into Your Investments
 - Ki’mola Indigenous Capital
 - Procurement
- 11:15 am **Breakout Sessions:**
 - Tales From The Advisory
 - Two Perspectives On Investing
 - Spending Policies
 - ESG - Economic Social Governance
 - Making Your Resources Work For You
- 12:15 pm Lunch
- 1:15 pm **Breakout Sessions:**
 - Investment Advance
 - Indigenous Tourism
 - Effectively Monitoring Your Service Providers
 - Financial Literacy For The Everyday Trustee
- 2:15 pm How To Get Control Of Your Ottawa Trust Fund
- 3:15 pm Door Prize - Air Canada Gift Card

