



# “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

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

**Keynote Speaker:**  
**Tahu Potiki, Ngai Tahu Charitable Trust**



## DAY 1: WEDNESDAY, MAY 23, 2018

- 9:00 am Opening Ceremonies
- 9:30 am Business Chemistry - *Vickie Whitehead and Meghan Shannon, Deloitte*
- 10:30 am Break
- 10:45 am Ngai Tahu Charitable Trust - *Tahu Potiki, Ngai Tahu Charitable Trust*
- 11:45 am **Breakout Sessions:**
  - Trust Structures: What Works Best For You And Your Community - *Jaimie Lickers, Gowlings WLG; Jeff Harris, Meyers Weinberg LLP*
  - Trust Basics - *Rachel Bayly and Heather Richardson, TD Trust*
  - Investment Basics - *Steven Smith, Beutel Goodman Investment Counsel*
  - Youth Engagement - *Tobi Mitchell, Chiefs of Ontario; Stephen Daniels, Peguis First Nation*
- 12:45 pm Lunch
- 1:45 pm **Breakout Sessions:**
  - Financial Literacy: Youth - *Linda Hartford, CIBC Trust*
  - Beardy Okenasis Band Specific Claims: ‘1885 Rebellion Claim’ - *Ron Maurice, Maurice Law*
  - Reconciliation and Responsible Investments - *Mark Sevestre, NATOA; Brian Holland, Guardian Capital; Jason Campbell, Sovereign Power; Moderator: Peter Chapman, SHARE*
  - Creating Sustainable Income For Your Community - *Wayne Wilson, Lincluden Asset Management*
- 2:45 pm **Breakout Sessions:**
  - US Tax Savings For Indigenous Communities - *Max Reed, SKL Tax*
  - Trust Investments To Work Together To Create Planned Outcomes - *Andrew Hoffman, Leith Wheeler Investment Counsel*
  - Indigenous Women: What It Takes To Succeed In Today’s World - *Tobi Mitchell, Chiefs of Ontario; Vickie Whitehead, Deloitte; Leanne Krueger, T.E. Wealth; Jamie Lickers, Gowlings WLG*
  - First Nations Wealth Management Through Good Governance - *Georgina Villeneuve and Jeff Frketich, Peace Hills Trust; Chief Clarence Easter, Chemawawin Cree Nation*
- 3:45 pm Developing A Prudent Investment Policy - *Robert Laughton, Foyston, Gordon & Payne Inc.*
- 4:15 - 6:30 pm ‘Speed Meeting’ Ice Breaker - *Hosted by TD Bank*

*\*Agenda is subject to change*



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## DAY 2: THURSDAY, MAY 24, 2018

- 9:00 am OEDC: Indigenous and Regional Economic Development Project - *Patrick Watson, Indigenous and Northern Affairs Canada*
- 10:00 am Break
- 10:15 am **Breakout Sessions:**
  - Trust Advance - *Linda Hartford; CIBC Trust*
  - Implementing Your Values Into Your Investments - *Andrew Hoffman, Leith Wheeler Investment Counsel; Jason Campbell, Sovereign Power*
  - Ki'mola Indigenous Capital - *Michael Bonshor, Ki'mola Indigenous Capital*
  - Procurement - *JP Gladu and Max Skudra; Canadian Council for Aboriginal Business (CCAB)*
- 11:15 am **Breakout Sessions:**
  - Tales From The Advisory - *Denny Roman, KeyPoint Wealth; Claude Macrin, Macor Capital Management; Jack Jamieson, T.E. Wealth; Monitored by Tobi Mitchell, Chiefs of Ontario*
  - Two Perspectives On Investing - *Linda Watts and Melanie McDonald, BMO Trust*
  - Spending Policies - *Leslie Walkus, Gwa'sala-'Nakwaxda'xw Band Trust*
  - ESG: Economic Social Governance - *Bob Walker, NEI Investments; Wayne Wilson, Lincluden Asset Management; Serge Pepin, BMO Trust*
- 12:15 pm Lunch
- 1:15 pm **Breakout Sessions:**
  - Investment Advance - *Lisa Caswell, Letko Brosseau and Associates Inc.*
  - Indigenous Tourism - *Keith Henry, Indigenous Tourism*
  - Effectively Monitoring Your Service Providers - *Leith Cardinal and Mark Sevestre, NATOA; Maxine Netro-Fehr, Vuntut Gwitchin Trust*
  - Financial Literacy For The Everyday Trustee - *Sharon Stevenson, Peguis Treaty Land Entitlement Trust*
- 2:15 pm How To Get Control Of Your Ottawa Trust Fund - *Sean Sullivan and Holly Beaton, Indigenous and Northern Affairs Canada*
- 3:15 pm Door Prize - Air Canada Gift Card

