

May 23-24
2018

The Banff Centre | Banff, AB

NATOA 5th Annual Indigenous Trust and Investment Conference

“Be a Part of
Your
Community’s
Future”

PRE-WORKSHOP: TUESDAY, MAY 22

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



DAY 1: WEDNESDAY, MAY 23

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, Gowling WLG; Jeff Harris, Meyers LLP
- Trust Basics - Rachel Bayley 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:

- Who Wants To Be A Millionaire! - Sharon Stevenson, Peguis Treaty Land Entitlement Trust; Jack Jamieson, T.E. Wealth
- 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 - Michael Job and 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, Gowling 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

DAY 2: THURSDAY, MAY 24

9:00 am Breakout Sessions:

- OEDC: Indigenous and Regional Economic Development Project - Patrick Watson, Indigenous and Northern Affairs Canada
- PCD's - Per Capita Distribution - Linda Hartford, CIBC Trust; Jaimie Lickers, Gowling WLG; Vickie Whitehead, Deloitte
- Corporate Allyship: A Call for Truth - Gordon Larin, RBC Wealth Management - Indigenous Wealth

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; 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 - Casey Vanden Heuvel, Indigenous Tourism Association of Canada (ITAC)
- Effectively Monitoring Your Service Providers - Leith Cardinal and Mark Sevestre, NATOA; Maxine Netro-Fehr, Vuntut gwitchin Trust
- Financial Literacy For The Everyday Trustee - Linda Hartford and Alicia Dubois, CIBC Trust

2:15 pm How To Get Control Of Your Ottawa Trust Fund - Sean Sullivan, Indigenous and Northern Affairs Canada

3:15 pm Door Prize - Air Canada Gift Card