

Indigenous

Trust and Investment Conference

INVESTING IN TRADITIONAL VALUES

May 13 & 14, 2019

The Westin Bayshore Vancouver | Vancouver, BC



SUNDAY, MAY 12, 2019

5:00 pm NATOA Annual General Meeting

MONDAY, MAY 13, 2019 – DAY 1

9:00 am Opening Ceremonies

9:15 am Business Chemistry - *Deloitte*

10:00 am • Infrastructure Investment and the Alignment with Indigenous Values - *Clint Davis*

• Investment Basics - *Steven Smith*

• Amending Trust Agreements - *Jaimie Lickers*

• Negotiate or Litigate? - *Bruce McIvor*

10:45 am Break

11:00 am • Trust Basic - *Michelle Samagalski, Chris Angeconeb*

• Trust Structures for Self Governing Communities - *Daryn Leas*

• Scholarship Program - *Amanda Jacobs, Wendy Thompson*

• The Role of Culture and Traditional Values in Economic Development - *Jeff Frekitch, Georgina Villeneuve*

11:45 am Lunch

Tony Shirt Award - *Presented by Elizabeth Shirt*

12:45 pm • Investment Advance - *Lisa Caswell*

• Asset Allocation - *Wayne Wilson*

• Investment Management Performance Reviews - *Mark Sevestre, Claude Macorin*

• Manager Selection - *Jack Jamieson*

1:30 pm Break

1:45 pm • Indigenous Trusts and Responsible Investment: Communicating Expectations, Measuring Our Success - *Mark Sevestre, Shannon Rohan, Jason Campbell*

• Investment Cycles & Investment Styles - *Brian Holland*

• Financial Considerations when Developing a Trust: One Community's Journey - *Anthony Wright, Garry Laboucan*

• Integrating Your Trust with the Commercial Banking Relationship of Your First Nation - *Keith Martell*

2:30 pm Close-Off For The Day; Draw For Booth Contest and Survey - *Board of Directors*

3:45 pm Trustees Perspective - *Closed Room for Indigenous Communities Only*

TUESDAY, MAY 14, 2019 – DAY 2

9:00 am Opening Remarks / Draw for \$500 Gift Card

9:15 am • Case Study: Using Your Trust to Build a Better Community - *Cliff Fregin*

• Estate and Will Planning On and Off Reserve - *Dwight Dee*

• HST in Indigenous Trusts - The Caldwell First Nation Experience - *Robyn van Oirschot, Jaimie Lickers, Rachel Bayley, Moderator: Domenic Natale*

10:15 am Break

10:30 am • OECD - *Patrick Watson, Max Skudra, Chris McDonald*

• Creating a Financial Road Map for Your Trust - *Jamie Catterall, Melanie McDonald*

• Planning a Trust - *Doris Bonora, Chief Roland Twinn*

• Investment Bubbles: Past and Present - *Andrew Hoffman*

11:15 am Break

11:30 am • Trust Advance - *Linda Hartford*

• Economic Development - *Jonathon Arujo Redbird, Jacob Taylor*

• Gathering of Elders: Share Stories and Best Practices - *Elder Gathering Closed Room, Charles E. Wood*

12:15 pm Lunch

1:15 pm • How to Run an Effective Meeting - *Michele Young-Crook, Leith Cardinal*

• Creating and Implementing a Budget - *Meghan Shannon*

• Using Your Trust for in Community Programs - *Leslie Walkus*

• Preparing Your Youth - *TBD*

1:45 pm Break

2:00 pm • Community Trustees vs. Corporate Trustees - *Vickie Whitehead, Linda Hartford*

• Indigenous Tourism - *Keith Henry*

• Growth vs. Value: Cage Match - *Don Herman*

• Indigenous Wealth Strategy - *Michael Bonshor*

3:00 pm Closing Remarks / Q&A / Updates - *Board of Directors*

4:15 pm Door Prizes and Introduction to Reception - *\$1,000 In-Flight Passes*

4:30 pm Indigenous Food Tasting and Networking Reception - *Reception Sponsored by TD Bank*

