



11TH ANNUAL  
**TRU\$T &  
INVESTMENT  
CONFERENCE**  
APRIL 3 & 4, 2024  
LE CENTRE SHERATON | MONTREAL, QC

**UNLOCKING THE POTENTIAL OF YOUR TRUST!**

## SCHEDULE - DAY 1 (APRIL 3, 2024)

**8:00AM BREAKFAST AND REGISTRATION OPENS**

**9:00AM OPENING REMARKS**

**9:15AM SUCCESS SHARING FROM CREECO**

Founded in 1982, Creeco acts as a holding company for investments made by the Cree Nation of Quebec as a whole in construction, air transportation, hotel, catering and janitorial services, ground handling and aircraft fuelling. Hear from Vice Chairman, Randy Bosum on the challenges and successes of managing CREECO

**10:00AM THE GREAT BALANCING ACT: MEMBER PAYOUTS, COMMUNITY WELLBEING, AND THE SEVENTH GENERATION**

*Presented by FNB Trust*

Indigenous governments and organizations are increasingly managing wealth from successful economic development ventures and settlement claims. Indigenous citizens often want large lump sum payments from these to address immediate needs. Indigenous communities overall have significant needs for better housing, infrastructure, and services. And then there are the unborn children, grandchildren, great grandchildren and beyond. This is the great balancing act that First Nations, Métis and Inuit leaders face in managing this wealth. This session will highlight Indigenous practices in managing resources and how these are similar to managing financial resources.

**10:45AM BREAK**

**11:00AM BALANCING LONG TERM GROWTH AND INDIGENOUS RIGHTS**

*Presented by BMO Asset Management*

Indigenous Trust may face a bind – how to grow wealth in a way that aligns with their values and principles within a system that has historically caused them harm?

This session discusses:

- What portfolio diversification means and why it is commonly used as an investment approach to ensure stability and risk mitigation;
- How it can work hand in hand with responsible investment activities that try to address negative impacts from businesses on people and planet and advocates for respect for Indigenous rights
- Why Indigenous trust clients may find this investment policy approach to be the most effective way forward to achieve their goals in an imperfect system.

**11:45AM RECONCILIATION AND RESPONSIBLE INVESTMENT**

*Presented by RRII*

The RRII will explore how our Indigenous Trusts can utilize our Community and Traditional Values in our invested funds and make an impact on the Canadian Economy. From the implementation of our values in our investment policy to actively engaging with the companies in our portfolios, we have the opportunity to work with our Investment Managers to better meet the expectations of our beneficiaries and future generations. A discussion of practical steps to ensure Indigenous and Responsible Investment concepts are an important basis of your portfolio and resources that will support your journey

**12:25PM REMARKS FROM OUR LUNCH SPONSOR**  
*Addenda Capital*

**12:30PM LUNCH**

**1:30PM BETTER PARTNERSHIPS, STRONGER COMMUNITIES: HOW TO BUILD EFFECTIVE TRUSTEE AND INVESTMENT MANAGER RELATIONSHIPS**

*Presented by Mawer Investment Management*

A panel discussion that will explore how to build stronger relationships between trustees,

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## SCHEDULE - DAY 1 (APRIL 3, 2024) - CONTINUED

investment managers, and other industry partners; ways to recognize and better utilize the strengths of trustees; and how strengthening these partnerships can be engaged in better service to communities.

2:15PM

### BREAKOUT SESSIONS

#### **UNLOCKING THE INVESTMENT POTENTIAL OF YOUR TRUST (Main Ballroom)**

*Presented by CCL Financial*

In this session, Peter will share practical insights to optimize the investment potential of your trust. Based on his experience and through observing trustees' decision-making, he will discuss essential investment learnings, as well as common behavioral biases that can adversely impact our decision outcomes. The presentation will also feature a case study highlighting the role of energy transition in tackling climate change. Peter will discuss how Indigenous communities can benefit from participation in such projects, and how it can help promote economic empowerment and sustainable community development.

#### **EFFECTIVE COMMUNICATION STRATEGIES (Drummond Room 1 – 3rd floor)**

*Sponsored by Dixon Mitchell Investment Counsel*

*Presented by Symmetry Public Relations*

Explore the critical role effective communication plays in building and maintaining trust. This session will bring practical insights and tips for community engagements as a foundational element for successful outreach and relationship building. Join us to discover how to implement these approaches in your context to foster a stronger, more connected community.

### INVESTMENT 101

**(Drummond Room 2 – 3rd floor)**

*Presented by Beutel Goodman*

Investment Basics 101 provides an introduction to investing for Trust portfolios. The workshop focuses understanding Stocks, bonds, and other investments and explains how they are used to achieve the objectives of the investment Trust and benefit communities.

This introductory course is designed for both new and seasoned trustees to introduce new concepts and to enhance knowledge of trust investment portfolio management.

3:00PM

### BREAK

3:15PM

### ASSET ALLOCATION

*Presented by Leith Wheeler Investment Counsel*

Learn what has changed to dramatically alter how you invest to meet the needs of your Trust and what never will.

4:00PM

### COMMUNITY FUNDING FOR IMPACT

*Presented by TD Wealth*

How you allocate and manage the trust revenue you generate for your community will determine the success of your community and members over the long run. Panelists will discuss what they consider critical when evaluating and managing funding of projects and proposals. They will also share their experience and challenges with deciding how to allocate funds, setting a strong foundation, managing the challenges, and communication tips.

4:50PM-  
6:30PM

### NETWORKING RECEPTION

*Presented by TD Wealth*

Join us for refreshments and enjoy the music of Backwater Township

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**SCHEDULE - DAY 2 (APRIL 4, 2024)**

<b>8:00AM</b>	<b>BREAKFAST OPENS</b>	<b>12:30pm</b>	<b>LUNCH</b>
<b>9:00AM</b>	<b>OPENING REMARKS</b>	<b>1:30PM</b>	<b>THE JOURNEY TO SOVEREIGN WEALTH</b> <i>Presented by Jarislowsky Fraser &amp; Scotia Wealth Management</i> Indigenous communities continue to deal with numerous issues that prevent them from achieving true sovereign wealth. Skilled stewardship of trusts and investments can be a powerful tool to empower communities in achieving their own sovereign wealth. Join us in an engaging conversation where we explore these challenges and opportunities faced by each Indigenous community on their journey to achieving sovereign wealth.
<b>9:15AM</b>	<b>STRATEGIC THINKING AND HOW LEADING ESG PLAYS A ROLE IN SECURING TOMORROW</b> <i>Presented by Sarasin &amp; Partners</i> ESG is about best practice and continuous improvement to achieve your own stewardship objectives. These should align with sustainable outcomes for nature, climate, human and Indigenous rights	<b>2:15PM</b>	<b>BREAKOUT SESSIONS</b>
<b>10:00AM</b>	<b>INCORPORATING YOUR NATION'S VALUES INTO YOUR INVESTMENTS</b> <i>Presented by Lincluden Investment Management</i> Mark Sevestre of Mississaugas of the Credit First Nation and Wayne Wilson from Lincluden Investment Management will discuss ESG investing incorporating First Nation values.	<b>BEST PRACTICES AND TRENDS FOR YOUR TRUST (Main Ballroom)</b> <i>Presented by RBC</i> Join us for a lively panel discussion on successes, best practices, and trends that we have seen in recent years. The discussion will be framed through the lens of community trustees, as well as professional advisors, including corporate trustee and investment professionals. Through their personal experience, each of our panelists will share tips and insights that they have found useful.	
<b>10:45AM</b>	<b>BREAK</b>	<b>KEY STEPS IN THE DEVELOPMENT AND IMPLEMENTATION OF YOUR TRUST AND INVESTMENT PORTFOLIO (Drummond Room 1 – 3rd floor)</b> <i>Presented by TE Wealth</i> Volatile investment markets and rising inflationary pressures have imposed increased investment challenges for trustees and community leadership. The trust and investment development process requires a sequential order of events. This ensures the Trust can meet current economic and social priorities and enable similar opportunities for future generations.  Considerations include member engagement (and the impact of potential "per capita	
<b>11:00AM</b>	<b>MAKING IT WORK</b> <i>Presented by CIBC</i> Structuring and Ongoing Management of your Trust to ensure it meets your Community's Vision, Values and Goals		
<b>11:45AM</b>	<b>TRAUMA OF MONEY</b> What does it mean to have financial safety and wellness and why is financial literacy not enough to get there? Our relationship with money is far more complex than the amount of money we have or don't have. It is about having healthy beliefs and behaviors and gently working through our financial trauma and depersonalizing financial shame. Come compassionately explore research-based ideas around:  <ul style="list-style-type: none"> <li>· The 5 Core Values of Financial Shame</li> <li>· Financial Trauma and the Brain</li> <li>· The Psychology of Scarcity and How to Step into Abundance</li> <li>· Trauma of Money Method's 6-layer Model of Healing</li> </ul>		

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distributions”), spending policies, asset mix considerations, ESGI and the manager search process. All the above play an important role in developing an effective investment strategy. Implementing an effective investment strategy increases the probability of success in meeting community and trust objectives.

**INDIGENOUS POOLED INVESTMENTS  
 (Drummond Room 2 – 3rd floor)**

*Presented by First Nations Financial Management Board*

Indigenous nations are growing their wealth and assets under management. This trend has seen a major uptick in recent years. But how is this money invested? Are your investments impacting the indigenous economy? Are they costing more than they should? Are you getting the biggest bang for your buck? Could our

nations benefit from a different model? Pooled investments could be a solution, giving greater voice to Indigenous money and making an impact in our nations.

**3:00PM BREAK**

**3:15PM COMMUNITY AND INDUSTRY BREAKOUTS**  
 We will use the last session of the day to discuss and share emerging trends, issues and questions facing the Trust community.  
**Group 1:** Trustees and Community Representatives (Location: Main Ballroom)

**Group 2:** Industry Professionals and Corporate Trustees (Location: Drummond 1 – 3rd floor)

**3:50PM CLOSING REMARKS**

We will end the day with closing remarks from NATOA and announcement of our raffle winners!

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