



13TH ANNUAL  
**TRUST &  
INVESTMENT  
CONFERENCE**  
MARCH 30 – APRIL 1, 2026  
THE WESTIN OTTAWA | OTTAWA, ON

**Conference Theme: Building Trust in Trusts: Governance, Impact, and Sovereign Wealth for the Next Seven Generations**

## MONDAY, MARCH 30, 2026

- 10:00 AM - 11:30 PM**    **ANNUAL GENERAL MEETING (AGM) – PROVINCES BALLROOM 2**
- 1:30 PM - 4:30 PM**    **INDIGENOUS INVESTORS DAY (IID) – CONFEDERATION ROOM 1**  
*Presented By: Reconciliation and Responsible Investment Institute (RRII)*
- 3:00 PM - 7:00 PM**    **REGISTRATION – CONFEDERATION ROOM LOBBY**

## TUESDAY, MARCH 31, 2026

- 9:00 AM - 9:30 AM**    **OPENING CEREMONY & WELCOME – CONFEDERATION ROOM**  
*Elder prayer, and welcome from Wayne Kaboni, Interim ED, Board Member*
- 9:30 AM - 10:30 AM**    **PLENARY 1: FROM TRUST DEED TO DAILY PRACTICE: MODERN INDIGENOUS TRUST GOVERNANCE – CONFEDERATION ROOM**  
*This plenary examines how communities move from what is written in a trust deed to how governance actually works day-to-day in meetings, policies, and decisions. Speakers will explore how Indigenous laws, values, and ceremonies can shape board conduct, oversight, and transparency so that members see and feel that trusts are genuinely working for seven generations.*
- 10:30 AM - 10:45 AM**    **BREAK – CONFEDERATION ROOM LOBBY**
- 10:45 AM – 12:00 PM**    **WORKSHOPS**
- WORKSHOP A1 – GOVERNANCE MODERNIZATION LAB: UPDATING GOVERNANCE MANUALS, CODES OF CONDUCT, AND CONFLICT-OF-INTEREST POLICIES – GOVERNOR GENERAL 1**  
*This lab walks participants through practical steps to update governance manuals, codes of conduct, and conflict-of-interest policies so they reflect both fiduciary standards and Indigenous laws, values, and protocols. Trustees will work with sample clauses, scenarios, and peer examples to leave with a clear checklist for modernizing their own trust structures in service of seven-generation stewardship.*
- WORKSHOP B1 – EMBEDDING COMMUNITY VOICE & IMPACT IN YOUR TRUST: COMMUNITY MEETINGS, REPORTING, AND MEASURING IMPACT BEYOND RETURN – GOVERNOR GENERAL 2**  
*This session focuses on how to design community meetings, reporting practices, and impact measures that go beyond financial returns and tell a fuller story of community well-being. Participants will explore practical tools for co-creating priorities with members, communicating complex information in plain language, and linking their trust's decisions to visible outcomes for future generations.*

*\*All times are in Eastern Standard Time (EST). Agenda is subject to change.*



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**12:00 PM - 1:00 PM**

**LUNCH – CONFEDERATION ROOM LOBBY**

**1:00 PM - 2:00 PM**

**PLENARY 2: WHAT DO TRUSTS LOOK LIKE FOR THE NEXT 7 GENERATIONS:  
BUILDING CAPACITY & MEASURING IMPACT – CONFEDERATION ROOM**

*This plenary looks ahead to how Indigenous trusts can remain relevant and resilient over 10, 20, and 50 years by investing in people, systems, and data. Panelists will discuss capacity-building for trustees and staff, frameworks for measuring impact beyond returns, and what long-term success could look like for future generations.*

**2:00 PM - 2:15 PM**

**BREAK – CONFEDERATION ROOM LOBBY**

**2:15 AM – 3:15 PM**

**WORKSHOPS**

**WORKSHOP A2 – BOARD & COMMITTEE EFFECTIVENESS IN PRACTICE:  
ROLES, REGIONAL REPRESENTATION, YOUTH/ELDER INVOLVEMENT, AND  
COMMITTEE CHARTERS – GOVERNOR GENERAL 1**

*This workshop examines roles, regional representation, youth and Elder involvement, and committee charters as the “plumbing” that either builds or erodes trust in trusts. Through case examples and discussion, trustees will clarify decision-rights, strengthen accountability, and design structures that bring more voices to the table while still enabling timely, high-quality decisions.*

**WORKSHOP B2 – RECONCILIATION AND RESPONSIBLE INVESTMENT:  
UNDRIP, TRC 92, AND RAPS IN ACTION – GOVERNOR GENERAL 2**

*This session focuses on how to design community meetings, reporting practices, and impact measures that go beyond financial returns and tell a fuller story of community well-being. Participants will explore practical tools for co-creating priorities with members, communicating complex information in plain language, and linking their trust’s decisions to visible outcomes for future generations.*

**3:15 PM - 3:30 PM**

**BREAK – CONFEDERATION ROOM LOBBY**

**3:30 PM - 4:30 PM**

**CLOSING COMMENTS: BUILDING TRUST IN TRUSTS: GOVERNANCE AS CEREMONY  
AND LONG-TERM STEWARDSHIP – CONFEDERATION ROOM**

*This plenary looks ahead to how Indigenous trusts can remain relevant and resilient over 10, 20, and 50 years by investing in people, systems, and data. Panelists will discuss capacity-building for trustees and staff, frameworks for measuring impact beyond returns, and what long-term success could look like for future generations.*

**4:30 PM - 7:00 PM**

**FREE TIME**

**7:00 PM - 10:00 PM**

**NATOA TRUST & STEWARDSHIP AWARDS GALA – CONFEDERATION ROOM**

*Pre-Dinner Reception*

*Dinner & Program:*

*Welcome from NATOA and Gala Title Sponsor.*

*Award Presentations: Trust of the Year, Allied Partner of the Year, & Community Service & Leadership Award*

*Closing remark*

*Music Performance & Closing Circle*

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## WEDNESDAY, APRIL 1, 2026

- 9:00 AM - 9:30 AM**      **OPENING & WELCOME – CONFEDERATION ROOM**  
*Elder prayer, and welcome from Wayne Kaboni, Interim ED, Board Member*
- 9:30 AM - 10:30 AM**      **PLENARY 3: INDIGENOUS-LED CAPITAL AND SOVEREIGN WEALTH FOR THE NEXT SEVEN GENERATIONS – CONFEDERATION ROOM**  
*This plenary focuses on Indigenous-led capital structures—trusts, IFIs, pooled funds, and other vehicles—that support long-term sovereign wealth. Speakers will highlight how Indigenous ownership, governance, and values can shape capital flows so that wealth serves land, language, and people far into the future. seven generations.*
- 10:30 AM - 10:45 AM**      **BREAK – CONFEDERATION ROOM LOBBY**
- 10:45 AM – 12:00 PM**      **WORKSHOPS**
- WORKSHOP A3 – TRUSTS IN ACTION: COMMUNITY STORIES OF REFORM, IMPACT, AND HEALING – GOVERNOR GENERAL 1**  
*This story-driven workshop shares real examples of communities that have restructured trusts, healed past harms, and redesigned governance to better match community values. Panelists will focus on what triggered change, how community dialogue was held, and what practices have helped rebuild confidence in trust governance over time.*
- WORKSHOP B3 – PER-CAPITA, MINORS' TRUSTS, AND MULTI-GENERATION PLANNING – GOVERNOR GENERAL 2**  
*This session explores how communities design and manage per-capita distributions, minors' trusts, and long-term benefit structures in ways that balance immediate needs with intergenerational wealth. Panelists will share policy options, communication strategies with families and youth, and governance tools that support financial literacy and protect wealth for the next seven generations.*
- 12:00 PM - 1:00 PM**      **LUNCH – CONFEDERATION ROOM LOBBY**
- 1:00 PM - 2:00 PM**      **PLENARY 4: OUR TRUSTS IN 2035: GOVERNANCE, IMPACT, AND SOVEREIGN WEALTH – CONFEDERATION ROOM**  
*This forward-looking plenary brings together trustees, youth, and capital partners to imagine what Indigenous trusts could look like by 2035. The discussion will weave governance reforms, impact measurement, and sovereign wealth strategies into a shared vision that centres future generations and community self-determination.accessibility.*
- 2:00 PM - 2:15 PM**      **BREAK – CONFEDERATION ROOM LOBBY**
- 2:15 PM – 3:15 PM**      **CLOSING COMMENTS – CONFEDERATION ROOM**  
*The closing session ties the conference together by framing governance as a form of ceremony and long-term relational stewardship, not just administration. Speakers will reflect on what has been learned, what must change, and how trustees, communities, and partners can walk together in building trust in trusts for the next seven generations.*

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