

## DAC AGENDA AT A GLANCE

### SUNDAY NOVEMBER 11 - REGISTRATION

**STAY ON TO JOIN US FOR DAC – THE DISTINGUISHED ADVISOR CONFERENCE – NOVEMBER 11 – 14. Featuring 20 outstanding thought leaders,** the DAC is renowned for its detailed look at the financial issues and trends that will affect your business, your career and most important, your clients over the next 24 months. Check back often as we add more outstanding speakers and topics to the roster.

12:00 – 5:00 PM	Registration Hilton Hotel
12:15 – 5:00 PM	<b>Brunch &amp; Discovery Tour</b> of Île D'orléans (Optional)
5:30 – 6:30 PM	Speaker and Sponsor Rehearsal – Sponsored by Knowledge Bureau
6:30 – 7:00 PM	<b>FIRST TIMER RECEPTION</b> – Sponsored by Moodys Gartner Tax Law LLP
7:00 – 9:00 PM	<b>WELCOME RECEPTION:</b> Featuring the Young DAC Advisor Award Winner

### MONDAY NOVEMBER 12 - CHANGING FACE OF THE GLOBAL ECONOMY

7:00 – 7:45 AM	Buffet Breakfast
7:45 – 8:00 AM	<b>WELCOME &amp; OPENING REMARKS</b> with Olympian Caroline Ouellette
8:00 – 8:45 AM	<b>WORKING BEYOND OUR PRIVILEGE</b> with Evelyn Jacks, MFA, President Knowledge Bureau
8:45 – 9:30 AM	<b>THE 5-STEP PROGRAM: Fixing Canada's Competitive Challenge</b> with Dr. Jack Mintz, President's Fellow at the University of Calgary's School of Public Policy
9:30 – 10:15 AM	<b>CYBERSECURITY AND PRIVACY: Striking the Balance</b> with Dr. Michael Geist, Canadian Research Chair in Internet and E-commerce Law University of Ottawa
10:15 – 10:45 AM	Mimosa Break sponsored by Home Trust
10:45 – 11:30 AM	<b>IMPACT INVESTING: Aligning Investing with Purpose</b> with Bonnie Foley-Wong, author of <i>Integrated Investing: Impact Investing with Head, Heart, Body, and Soul.</i>
11:30 – 12:15 PM	<b>LEADERSHIP REQUIRED: Dealing with Diversity and Inclusion in Your Workplace</b> with Olympian Caroline Ouellette
1:00 – 2:30 PM	<b>FRANKLIN TEMPLETON LUNCH AND LEARN: Understanding Hedge Funds</b> with Alexis Verganelakis, VP Regional Sales sponsored by Franklin Templeton
3:00 – 5:00 PM	Walking Tour of Old Quebec (Optional)
7:00 – 10:00 PM	La Bûche Dine Around or on own

### TUESDAY NOVEMBER 13 - CHANGING FACE OF ADVICE

7:00 – 7:45 AM	Buffet Breakfast
7:45 – 8:00 AM	<b>OPENING REMARKS</b> with Dean Cockell, MFA, Manager Portfolio Strategies Winnipeg
8:00 – 8:45 AM	<b>MAXIMIZING FAMILY BUSINESS WEALTH: How to Avoid Inherent Dangers In Today's Complex Tax Environment</b> with Kim Moody FCA, TEP, Director, Canadian Tax Advisory sponsored by Moodys Gartner Tax Law LLP, Calgary
8:45 – 9:30 AM	<b>KNOW YOUR DUAL RESIDENT CLIENT: How to Avoid Legal Liability with U.S. Persons</b> with Dean Smith, PHD, CFP, TEP, CPA, CA, Partner, Cadesky Tax, Sponsored by Cadesky Tax
9:30-10:15 AM	<b>ETHICS, COMPLIANCE AND TECHNOLOGY: Understanding the Evolving Nature of Advice</b> with Susan Allemang, Director of Policy and Regulatory Affairs, sponsored by IFB
10:15-10:45 AM	Mimosa Break sponsored by Home Trust
10:45 – 11:30 AM	<b>UNDERSTANDING IMMIGRANTS: Your Role in Pointing Newcomers in the Right Direction</b> with Shoshana Green, Partner Green & Speigel LLP, Toronto

11:30 -12:15 PM	<b>WEALTH PLANNING: Insuring Younger Clients and Newcomers to Canada</b> with Helene Chatelain, Chief Underwriter, sponsored by ivari
1:00 -2:30 PM	Lunch and Learn with Xero Online Accounting Solutions
3:00 – 5:00 PM	Walking Tour of Old Quebec (Optional)
6:00 – 7:00 PM	MFA, DFA-Specialist Designation Reception <i>by invitation only</i>
7:00 – 10 :00 PM	Sparkle and Shine Knowledge Bureau’s 15 <sup>th</sup> Anniversary Birthday Bash
<b>WEDNESDAY NOVEMBER 14 – CHANGING FACE OF RELATIONSHIPS</b>	
7:00 – 7:45 AM	Buffet Breakfast
7:45 – 8:00 AM	<b>OPENING REMARKS</b> with Mick Kelly, Business and Insurance Lending Specialist, Manulife Bank, BC.
8:00 – 8:45 AM	<b>PROVIDING INVALUABLE ADVICE: <i>Why the Story of Professionalism is Such a Good One Today</i></b> with Ian C. W. Russell, President and CEO, The Investment Industry Association of Canada
8:45 – 9:30 AM	<b>ETHICS IN AGING: Your Duty in Supporting Your Elderly Client</b> with Alexis Verganelakis, VP Regional Sales sponsored by Franklin Templeton
9:30 – 10:15 AM	<b>CLOSING THE POVERTY GAP: The CLB and CESG</b> with Pierre Labbé, Manager, Strategic Partnerships and Outreach, Canada Education Savings Program, Employment and Social Development Canada
10:15 – 10:45 AM	<b>YOUR NEW IDEAL CLIENT: How Constructive Listening Helps Engage Culturally Diverse Clients</b> <b>DANIEL COLLISON B.A., CFP, TEP Managing Partner, Advice to Advisors</b>
10:45 – 11:15 AM	Mimosa Break sponsored by Home Trust
11:15 – 11:45 AM	<b>THE PHILANTHROPIC CONVERSATION: How Enabling Client Philanthropy Can Help Build Your Business and Brand – Ruth Mackenzie, CEO &amp; President CAGP</b>
11:45 – 12:30 PM	<b>A NEW CANADIAN DREAM: Financial Independence for Everyone – The Honorable Patricia Bovey</b>
12:30 – 12:35 PM	<b>CLOSING REMARKS AND PRIZES</b> with Evelyn Jacks, MFA, President, Knowledge Bureau
1:30 – 5:30 PM	Lunch & Siberia Spa (Optional)

## BUSINESS BUILDER RETREAT AGENDA AT A GLANCE

**ON NOVEMBER 10<sup>TH</sup> AND 11<sup>TH</sup> – Knowledge Bureau will debut an exciting new concept prior to DAC: The Business Builder Retreat. Especially for Growth-Oriented Business Owners:** Experience a unique educational event designed especially for business owners on an exponential growth path. Explore topics critical to your leadership development, with a network of business owners from across Canada who understand the challenges you meet daily, competing in a world awash with unprecedented change. The focus is equally on healthy living priorities and the strategic business decisions required to prepare your business and the stakeholders around it, for opportunities in today's new economy. Take 24 important hours to refresh and refocus and get more of the personal and business results you want. **RSVP by calling 1-866-953-4769 or enroll online here:**  
<http://www.knowledgebureau.com/index.php/dac2018/executive-business-builder-retreat-speakers/>

### SATURDAY NOVEMBER 10

4:00 – 6:00 PM	Registration and Badge Pick Up Hilton Hotel Lobby
6:30 PM	Meet at Le Monastère Des Augustines
6:30 – 7:30 PM	Tour Of Le Monastère Des Augustines
7:30 – 9:30 PM	<b>STEP 1: WHAT'S YOUR STORY? COLLABORATIVE DINNER</b> Moderator / Sponsor Dean Cockell, MFA, Manager, Portfolio Strategies

### SUNDAY NOVEMBER 11 – at Le Monastère des Augustines

7:15 – 8:00 AM	<b>REFUEL AND AWAKEN YOUR SENSES</b> Buffet Breakfast with Master of Ceremonies Alan Rowell, RWM, MFA, DFA-Tax Services Specialist
8:00 – 8:30 AM	<b>REVITALIZE AND REFOCUS:</b> Cardiac Coherence Techniques with Marjolaine Leblanc
8:30 – 9:30 AM	<b>STEP 2: RENEW YOUR PASSION</b> with Dan Collison
9:30 – 10:30 AM	<b>STEP 3: ENHANCE YOUR LEADERSHIP POTENTIAL</b> with Joanne Sigurdson
10:30 – 10:45 AM	<b>HEALTH BREAK:</b> Grab a Shot
10:45 – 11:15 AM	<b>SHARPEN YOUR CONCENTRATION</b> with Claudia Delgado
11:15 – 12:00 PM	<b>STEP 4: RETHINK YOUR STRATEGIC PLAN</b> with Jenifer Bartman
12:00 – 1:30 PM	<b>THE PLEASURES OF HEALTHY EATING</b> with Julie Isabel
1:30 – 2:30 PM	<b>STEP 5: CREATE YOUR SAFE HAVENS</b> with Phillippe Richer
2:30 – 3:00 PM	<b>STEP 6: MANAGE YOUR FRIEND AND FOE: TECHNOLOGY!</b>
3:00 – 3:30 PM	<b>NOGGIN NOSH AND CHAIR YOGA</b> with Marjolaine Leblanc
3:30 – 4:15 PM	<b>STEP 7: RECREATE YOUR PEOPLE POWER</b> with Evelyn Jacks
4:15 – 4:30 PM	<b>POWER SURGE:</b> <b>COMMIT TO YOUR RENEWED ENERGY AND ZEAL FOR SUCCESS!</b>