



DAC ACUITY 2023

BANFF, AB | NOVEMBER 12-14

“IMAGINE!”

Break free to Embrace Transformative Change

SATURDAY NOV 11, 2023

SOCIAL SCHEDULE

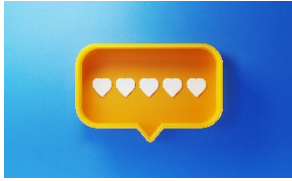
2:30 – 7:30 pm 5:30 pm Dinner Only	<p>WALKING AND HISTORY TOUR OF BANFF:</p> <p>Enjoy a customized tour from The Fairmont Banff Springs to the Town of Banff and learn about the Town’s rich history. We depart the hotel follow and the Bow River where guests learn about the majestic environment around Banff. Guests will see the amazing 360 degree mountain views while cross Banff’s famous pedestrian bridge. We will stop to see some of Banff’s most important locations like the Cascade Gardens, Whyte Museum, Chapel and Banff Ave during this experience.</p> <p>Once the tour is completed guests will enjoy some free time to wander downtown Banff followed by a 3 course dinner at 3 Bears Restaurant . A pass to take ROAM transit back at leisure after dinner is included with tour.</p> <p>Walk Length 3 KM (easy) – 2.5 Hours Dress: Warm for winter Meeting Place: Adventure Centre Clothing: Please dress according to the weather, in layers. For November, warm winter wear is recommended along with outdoor hiking or winter boots depending on the conditions. \$160 pp+gst (beverages on own) 12 max for walk Dinner Only Option \$90 pp+gst</p>
8:30 – 10:00 pm	Hot Tub Meet Up Fairmont Banff Springs

THANK YOU TO OUR SPONSORS

TITLE	PRO-TAX BLOCK GROUP
EMERALD	TBA
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SILVER	HOMETRUST, CADESKY TAX, MOODY’S TAX LAW
BRONZE	MANULIFE BANK, FRASER AND PARTNERS
MEDIA	IE
Association	ADVOCIS

SUNDAY NOV 12, 2023

11:00 – 1:30



THE OPEN FORUM: DAC BRUNCH
THE DISCUSSION: THE COURAGE TO BREAK FREE!
THE HOST: SOCIETY OF RWM™
YOUR MC: KRISTIN RAMLAL
RSVP: OPEN TO ALL DELEGATES WHO SIGN UP BY JUNE 30

Want to get your blood pumping and your imagination soaring? Join us for an open conversation about what's holding us back in making transformational change in your industry. What does it take to break free? No cameras, no recordings, just an opportunity to speak plain truth and brainstorm for proactive change for the future.

Venue: A beautiful local brewery. . .stay tuned for cost updates.

1:30 – 2:30 PM

BUSINESS NETWORKING OPPORTUNITY

2:00 – 8:00 PM

CONFERENCE REGISTRATION

4:00 – 5:30 PM

BREAK FREE BOWLING – A FUN ICE BREAKER AT THE BANFF SPRINGS HOTEL
Brought to you by Home Trust



6:00 – 7:00 PM

DESIGNATED SPECIALIST WINE AND CHEESE MEET AND GREET
Master of Ceremonies Alan Gordon, Director of Operations, Knowledge Bureau and brought to you by Moody's Tax Law



5:30 – 6:30 PM

Speaker Rehearsal

7:30 – 9:00 PM

20TH ANNIVERSARY WELCOME RECEPTION & GRADUATE AWARDS

Master of Ceremonies:

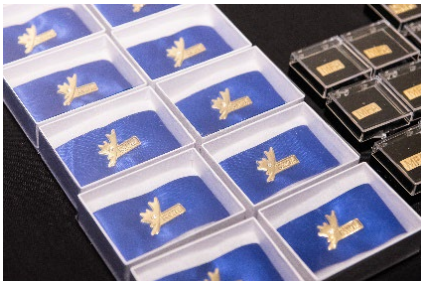
Alan Gordon, Director of Operations, Knowledge Bureau

Fellow of Distinguished Financial Specialists™ Awards

Keynote Evelyn Jacks, President, Knowledge Bureau

2023 Designate Graduate Awards

Carol Scott, Registrar



Host Sponsor, Valedictorian and Round Table MC: Dr. Dean Smith, Cadesky Tax

FDFS Round Table: Future Thought from the Fellows

MONDAY NOV 13, 2023 THEME: IMAGINE!	
7:00 – 8:00 AM	BREAKFAST BUFFET
7:30 – 8:00 AM	Opening remarks with your Master of Ceremonies – TBA
8:00 – 8:45 AM Knowledge Bureau Keynote: Evelyn Jacks, President	WEALTH MANAGEMENT REIMAGINING THE FINANCIAL SERVICES: Democratizing Financial Peace of Mind Is wealth management just for the wealthy? Imagine broadening the audience for wealth management services to more retail clients. What new potential would society experience? Why is this critically important for our prosperous future? How could it be accomplished? The secret is in helping more people understand how to invest, with tax efficiency. Find out why this is a noble social cause and how you can be part of it.
8:45 – 9:30 AM BCV Asset Management Mr. Tony Demarin MBA, CFA, CIM, FSCI, Chief Executive Officer	RETIREMENT PLANNING THE RESET: Portfolio Construction at Ground Zero The world and the investing climate have changed considerably since Y2K. While some areas have seen considerable change, there are also some principles to investing that have remained tried and true. This engaging presentation will look at the past, present and the future of security selection, portfolio construction and portfolio risk management. In the months and years to come, we may see higher interest rates, higher inflation and potentially lower corporate profitability and a cash-strapped consumer. If this is how the years unfold, we will explore important investment strategies that help to meet target returns while also managing risk during this type of market environment.
9:30 – 10:15 AM Knowledge Bureau Dr. Jack Mintz, President's Fellow of the School of Public Policy at the University of Calgary	TAX POLICY TRANSFORMATIVE CHANGE: Share Buy-Back Taxes & Other Game Changers Canada's corporate income tax is a mess, according to Dr. Jack Mintz. It discourages capital investment, it's highly distortionary and it's overwhelmingly complex, all of which impedes economic growth. Dr. Mintz will opine on the effect of recent corporate tax reforms have on business investment and, by extension, what that means for individual investors and business owners. From tax on split income, to SBD reductions, to new taxes on public companies and many layers of minimum taxes, learn what can be done to maximize the opportunity to build wealth against these new odds.
10:15 – 10:45 AM	MIMOSA BREAK
10:45 – 11:30 AM BMO Global Asset Management Lillian Ferndriger, Director, Alternatives Distribution	PORTFOLIO MANAGEMENT The Place for Private Equity
11:30 – 12:15 PM CANFIN Tony Mahibir, President	ETHICS AND TECHNOLOGY FINANCIAL STEWARDSHIP IN A DIGITAL AGE What ethical dilemmas will Advisors of the Future encounter in the face of transformative change? There are many - accountability, privacy, security, transparency and an absence of bias – to name but a few. With the burdens of recession, waning compensation and digital advances – think Chat GDP and more - what are the new the principles required to guide advisors as they continue to earn trust and provide exemplary services in difficult times?

<p>12:15-1:15 PM</p>	<p>BEHAVIOURAL FINANCE: Modern Mindfulness Workshop Mindfulness is more than a buzzword – it’s a lifestyle. Yet do you know what it means, and how to practice it to reap the incredible benefits: stress and anxiety reduction, greater mental wellbeing, resilience and relaxation? In this workshop Trish will demystify mindfulness and share several ways it can help us to thrive - to lift our mood, increase energy AND helps us experience new mental clarity after a morning of stimulating conference sessions.</p> <p>Experience simple yet effective techniques to rejuvenate and de-stress your mind and body - simple enough to integrate into your everyday life! In this gentle workshop (suitable for beginners and experienced alike) you’ll refresh your body and relax your mind.</p>
<p>1:15 – 2:00 PM AGA</p>	<p>INSURANCE PLANNING NEW TABLE STAKES IN GROUP INSURANCE: TPA, DEI & More The New “Non-Traditional” Insurance solution has arrived and it’s simple, agile and data secure. More importantly, this transformative change in insurance solutions highlights new delivery models that provide innovative ancillary benefits, virtual health care, wellness accounts and third party administration services that will help advisors delivery on risk managements solutions suited to a more risk adverse audience. Learn how to break free from the past in this informative session</p>
<p>2:00 – 2:45 PM Wealth One Barry Ferguson, Chief Operating Officer, Wealth One Bank of Canada, Richard Pyper, CEO, Monarch Wealth Systems, Inc.</p>	<p>INSURANCE PLANNING LEVERAGING VALUE: Debt Management Options for Business Owners</p>
<p>2:45 – 3:00 PM</p>	<p>BREAK</p>
<p>3:00 – 3:45 PM Franklin Templeton</p>	<p>PRACTICE MANAGEMENT ADVISORS OF THE FUTURE: How to Build Transformative Teams Hosted by Christine Logan, Head of Marketing, Americas Panelists : Keeley Simpson, B. Comm., CIM Stephanie Keller, CFP, RWM™ Teresa Black Hughes, CFP RFP CLU CIM FCSI</p>
<p>3:45 – 4:30 PM Johnston Group Donna Harris Lead Research Strategist & Digital Product Owner, Arete</p>	<p>LEADERSHIP DEVELOPMENT UNDERSTANDING YOUR LIFELOAD Do you feel like you are running a marathon without a finish line? Being aware of and managing your own LifeLoad - the unique combination of physical, emotional and cognitive stressors we each experience - is a strategy that can help! We all strive to achieve work-life balance, but work-life balance is almost impossible. LifeLoad is a research-based concept that can aid in achieving an effective work-life blend. Delegates will learn about the LifeLoad concept/model, the interplay between LifeLoad, performance and recovery, and be introduced to practical tools specifically designed to manage, maximize and sustain their personal well-being and performance in all facets of their lives.</p>

7:00 – 7:30 PM

DAC 20TH ANNIVERSARY COCKTAIL RECEPTION
EMERALD SPONSOR



7 :30 – 10 :30 PM

**OUTSTANDING NETWORKING &
ENTERTAINMENT FOR A TRULY
MEMORABLE EVENING**



THE DAC ANNIVERSARY SNOW BALL

Celebrate 20 years of DAC with a Gala Celebration!
Hosted by our Title Sponsor Dress : Black Tie Optional



TUESDAY NOVEMBER 14, 2023
BREAK FREE TO TRANSFORMATIVE CHANGE

7:00 – 8:00 AM	BUFFET BREAKFAST
7:30 – 8:00 AM Mandeep Singh, President, Tax Pro Block	MOTIVATIONAL KEYNOTE: RE-IMAGINE IT: DESIGN YOUR NEW LIFE Image waking up to a normal day of driving your cab, only to be involved in a devastating accident in a train that leaves you in a hospital bed for 5 years at the age of 32. How do you break free to transform your future, when you don't know if you will ever walk again? Hear the inspiring story of how one man with a high school diploma transformed himself to become an accountant, financial advisor, investor, and thriving entrepreneur of 6 office locations and more to come. Learn how discipline, vision and focus made the difference for Mandeep and his remarkable family.
8:00 – 8:45 AM Knowledge Bureau, TBA	INVESTING THE CDIC : IS IT ENOUGH? Leah Anderson, CDIC's President & CEO
8:45 – 9:30 AM Knowledge Bureau Dr. Robert Ironside, Professor of Finance	ECONOMICS THE FALLICY OF CONTINUOUS GROWTH
9:30 – 10:15 AM Dr. Dean Smith, President Cadesky U.S. Tax	CROSS BORDER TAX PLANNING BUYING AND SELLING PROPERTIES ABROAD
10:15 – 11:00 AM Larry Frostiak, FCPA, FCA, CFP, TEP, RWM™	PERSONAL TAX PLANNING THE UNDERUSED HOUSING TAX: A Wide Net is Cast
11:00 – 11:30 AM	Early Lunch
11:30 – 12:15 PM Kim Moody	CORPORATE TAX PLANNING OWNER MANAGER PLANNING : Unwinding Complexity with Tax Efficiency
12:15-1:00 PM Franklin Templeton Tom Junkin, Senior Vice President, Personal Trust Services at Fiduciary Trust Canada	PERSONAL ESTATE PLANINNG Secrets To Simplicity In Complex Planning It's true: planning for 80% of estates will be simple. There will be a transfer to spouse and then to children. But 20% ^h of the time, things can get complicated: entitled children become impatient; second spouses need to be taken care of, there is catastrophic illness or disability not previously anticipated, to name a few. Learn the secrets to simplicity in more complex estate planning cases.
1:00 – 1:45 PM TBA	BUSINESS ESTATE PLANNING WINNING STRATEGIES: Strategic Steps in Selling a Business
1 :45 – 2 :30 PM	THE KNOWLEDGE WRAP EMBRACE IT! You, the Catalyst for Change Evelyn Jacks, President, Knowledge Bureau

TRAVEL BOOKING INFORMATION AND DISCOUNT CODES

Banff Fairmont Springs :



[Welcome to Distinguished Advisors Conference 2023](#)

Book your hotel room for the event at special rates, available here on an exclusive basis. Rooms available from \$249.00 per night plus taxes and a \$14 pp/pn service fee.

Self Parking available \$32/Valet \$48 per night.

[Click here](#) for more information including driving directions

Air Canada :

To book a flight with your promotion code, access aircanada.com and enter your promotion code in the Promotion Code Box. **HUZGC4E1**

- The booking is to be made to the following city: Calgary, YYC (AB)
- The travel period begins Saturday, November 04, 2023 and ends Tuesday, November 21, 2023.
- Travel is valid Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday.
- For North America' 5% applies on standard fares, 10% on flex fares & higher. For International Travel' 10% on standard fares & higher.

WestJet :

Distinguished Advisor Conference, 5% off Econo* and 10% off EconoFlex and Premium fares for travel within Canada and 2% off Econo*, 5% off EconoFlex and 10% off Premium base fares for guests travelling Trans-border. To take advantage of this offer, you will need the discount code listed. Please visit www.westjet.com/conventions to make a booking online.

Applicable Rules

- The booking is to be made to the following city: Calgary
- The travel period begins: 11/4/2023
- The travel period ends: 11/22/2023
- No discount will apply to Basic or Business class bookings.

Coupon Code: Guest web/Travel Agent web	0S8P8PW
Promo Code: Travel Agent GDS only	YBD34

Transportation to the Fairmont Banff Springs :

Receive a **15% discount** on the Banff Airporter's daily shuttle service between the Calgary Airport and Banff. Click [Banff Airporter](#) and then Book Now. Proceed through the reservation and type - **DAC2023** - in the "Promo Code" section on the final payment page to receive the discount. This special rate is valid for travel dates between November 8-19th, 2023