



WEDNESDAY, JUNE 19, 2013

8:30	CONFERENCE REGISTRATION AND BREAKFAST IN THE FOYER <i>Sponsored by: First Asset ETFs</i>	
8:50 – 8:55	OFFICIAL WELCOME <i>Terry Krotowski, Vice- President, Radius Financial Education</i>	
8:55 – 9:00	OPENING REMARKS AND MASTER OF CEREMONY <i>Pat Bolland, Senior Counsel, Veritas Communications</i>	
9:00 – 9:30	ETFs IN CANADA <i>Representing the Canadian ETF Association: Yves Rebetez, Managing Director, Editor, ETFinsight</i> 2012 and 2013 has been a time of exponential growth and change in Exchange Traded Products. In this session we will drill down on the roll Canada has played as well as the growth and trends we have experienced. We will also discuss the trends occurring around the world.	
9:30 – 10:20	DEFENDING PORTFOLIOS AGAINST FINANCIAL REPRESSION WITH INTELLIGENT ETFs <i>Michael Cooke, Head of Distribution, PowerShares Canada</i> The drums are beating with warnings of the end of the 30-year bond bubble and the great rotation into equities. This comes at a time when North American stock markets are approaching all-time highs. Financial repression may serve to keep interest rates low for longer than people think, but it doesn't mean investors should abandon fixed income. Instead, they could consider strategies that mitigate risk and capture opportunities in fixed income markets. ETFs now offer innovative strategies to help investors build better fixed income and equity portfolios allowing them to step off the curb and back into equities while reducing risk and enhancing current income.	
10:20 – 10:40	NETWORKING BREAK IN EXHIBIT HALL <i>Sponsored by: Horizons ETFs</i>	
10:40 – 11:20	Concurrent Workshops	
	STREAM 1	STREAM 2
	NEW TOOLS IN ETF PORTFOLIO CONSTRUCTION <i>Introduced by: Pat Bolland, Senior Counsel, Veritas Communications</i> Jaime Purvis , Executive-Vice President, National Accounts, Horizons ETFs <ul style="list-style-type: none"> Maximizing tax efficiency in core portfolio holdings Achieving real diversification using alternative strategy ETFs 	THE EVOLUTION OF ETFs: BLENDING THE BENEFITS OF PASSIVE AND ACTIVE MANAGEMENT <i>Introduced by: Yves Rebetez, Managing Director, ETFinsight</i> Bobby Eng , Senior Vice President, Head of Sales, First Trust Portfolios Canada The evolution of the ETF market provides investors with a hybrid approach of blending the desired features of a traditional passive index tracking ETF with the risk management and stock filtering process of active management. How can we generate alpha while still investing in a cost efficient, transparent, tradable ETF structure?

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	STREAM 1	STREAM 2
11:20 – 12:00	<p>MYTHS AND MISCONCEPTIONS OF INTERNATIONAL INVESTING <i>Introduced by: Pat Bolland, Senior Counsel, Veritas Communications</i> Christopher Philips, Senior Analyst, Vanguard</p> <ul style="list-style-type: none"> • Global investable markets • Comfort food: Home cooking and home bias • Diversification: Alive and kicking • Implementing an international strategy 	<p>EXCHANGE TRADED RECEIPTS <i>Introduced by: Yves Rebetez, Managing Director, ETFinsight</i> Steve Higgins, Senior Manager, ETR Compliance & Investor Relations, Royal Canadian Mint</p> <p>Join Steve for an informative discussion on both the Canadian Gold Reserves and new Canadian Silver Reserves Exchange Traded Receipt (ETR) Programs. Learn about the unique structure and features of the ETRs and how they differ from other bullion ETF products in the market.</p>
12:00 – 1:00	<p>BUFFET LUNCH IN EXHIBIT HALL <i>Sponsored by: BMO Exchange Traded Funds</i></p>	
1:00 – 1:30	<p>ETF PRODUCT WORKSHOP <i>Moderated by: Amelia Nedovich, Head, Business Development, ETFs & Structured Products, Toronto Stock Exchange</i> Rohit Mehta, Senior Vice President Sales & Marketing, First Asset ETFs; Mark Webster, Vice President, Western Canada, BMO ETFs; Dean Allen, Head of Product Management, Vanguard</p> <p>Representatives of ETF providers will discuss how their products might be used in investors' portfolios to address some of the key issues financial advisors are facing in today's economic environment.</p>	
1:30 – 2:00	<p>ETF PRODUCT WORKSHOP <i>Moderated by: Amelia Nedovich, Head, Business Development, ETFs & Structured Products, Toronto Stock Exchange</i> Jaime Purvis, Executive-Vice President, National Accounts, Horizons ETFs; Michael Cooke, Head of Distribution, PowerShares Canada; Karl Cheong, Senior Vice President, Head of Product Development, First Trust Portfolios Canada</p> <p>Representatives of ETF providers will select ETFs from their suite of products to demonstrate how their construction is designed to meet specific objectives.</p>	
2:00 – 2:40	<p>RULES BASED ETFs – ARE THEY HERE TO STAY? Rohit Mehta, Senior Vice President Sales & Marketing, First Asset ETFs</p> <p>Although passive in nature, a new breed of ETFs with active characteristics applied to their structure has emerged. Rohit will discuss these innovative investment strategies and how they are changing the way ETFs are used in investment portfolios.</p>	
2:40 – 3:00	<p>NETWORKING BREAK IN EXHIBIT HALL <i>Sponsored by: Vanguard</i></p>	

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3:00 – 3:40	<p>BOND ETFs <i>Moderated by: Pat Bolland, Senior Counsel, Veritas Communications Scott Newman, Vice President, Global Investment Strategist, Invesco Canada Yves Rebetez, Managing Director, Editor, ETFinsight</i></p> <ul style="list-style-type: none">• I can buy my own bonds, why would I consider them?• Managing Premiums and Discounts• How to Trade FI ETFs
3:40 – 4:20	<p>BUILDING BETTER PORTFOLIOS <i>Moderated by: Mark Webster, Vice President, Western Canada, BMO ETFs Miles Clyne, Portfolio Manager, Raymond James; Therese Soong, Investment Advisor, IA Securities</i></p> <ul style="list-style-type: none">• Sophisticated Asset Allocation• Searching for Non-Correlation in a Correlated world• Focusing on Downside Protection
4:20 – 5:00	<p><i>You asked and we listened! Back by popular demand, Mark Yamada, President & CEO, PUR Investing</i></p> <p>“MONEYBALL: THE ART AND SCIENCE OF MANAGING OTHER PEOPLE’S MONEY”</p> <ul style="list-style-type: none">• what we do well• what we do poorly• how to completely change the game
5:00	<p>CLOSING REMARKS <i>Pat Bolland, Senior Counsel, Veritas Communications</i></p>
5:00 – 6:30	<p>RECEPTION IN EXHIBIT HALL <i>Sponsored by: PowerShares Canada Remember to bring your business cards! The not-to-be-missed Reception on the evening of Wednesday June 19th will provide you with crucial time to interact with key players in your industry.</i></p>

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