7:30 – 8:00 a.m.  Registration & Breakfast, Exhibitors’ Area Opens

8:00 – 8:30 a.m.  Annual General Meeting & Year at a Glance
Paul Harris, Chairman, Portfolio Management Association of Canada (PMAC) and Partner, Avenue Investment Management

8:30 – 8:35 a.m.  Conference Begins - Opening Comments
Katie Walmsley, President, PMAC

8:35 – 9:35 a.m.  Session I - “Market Outlook”
Ronald Temple, Portfolio Manager/Analyst and Director of US Research, Lazard Asset Management

Ronald Temple is a Managing Director and Portfolio Manager/Analyst on the Global Equity Select team as well as the large-cap US equity teams at Lazard Asset Management. In addition, he is co-director of research with primary coverage of the financial sector. He has been a leading authority on the US mortgage and credit crisis as well as the European financial crisis. Ron’s experience includes roles at Deutsche Bank AG, Bank of America NT & SA and Fleet Financial Group in London, New York, Singapore, San Francisco, and Boston covering fixed-income derivative trading, risk management, corporate finance and corporate strategy.

9:35 – 10:35 a.m.  Session II - “What Foreign Assets Will Investors Be Holding In The Near Future?”
Trevor Hunt, Vice President, BNY Mellon Wealth Management
John C. Siciliano, Managing Director, Global Strategy Lead, Asset Management Advisory, PwC Consulting
Carolyn Tsen, Pension Fund Senior Advisor, Hydro One
Marcus Turner, Senior Consultant, Towers Watson

While foreign content has been on a rapid rise with institutional investors over the past ten years, this session will look at trends in the composition of that foreign content. Are investors still interested in emerging markets or is that an old story? Will frontier markets take a place in Canadian institutional portfolios? Is investment in offshore private assets on the rise? Are these foreign investments largely active or is passive also playing a role? What vehicles are being used to invest globally: separate accounts, UCITS or other structures?

10:35 – 11:00 a.m.  Networking Break/Exhibits

11:00 a.m. – 12:00 p.m.  Session III - “Who Is Supplying Global Mandates To Institutional Investors in Canada?”
Julie Cays, Chief Investment Officer, College of Applied Arts and Technology (CAAT) Pension Plan
Mark Chow, Associate Partner, Canadian Head of Manager Research Due Diligence, AON Hewitt
Davis Walmsley, Vice President, Investment Management, Greenwich Associates

Are U.S. and international money managers gaining share in Canada? If so, is this simply because they offer product that Canadian managers do not or are foreign managers perceived to be superior? Are foreign managers that are gaining ground boutique managers or large scale multi-product managers? Is it important that managers have a presence in local markets or can they assess markets and investment opportunities from afar? Are Canadian managers increasing their global capabilities or sticking primarily to domestic assets? Are Canadian managers broadening their institutional client base outside of Canada? This session will explore the changing competitive landscape in Canada and considerations for investment firms to grow and maintain market share.
12:00 – 12:15 p.m.  Networking Break/Exhibits

12:15 – 2:00 p.m.  Luncheon/Keynote Address
Jeremy Gutsche, Award Winning Author, CEO & Innovation Expert

Jeremy Gutsche, MBA, CFA, is an innovation expert, award-winning author, and one of the most sought-after keynote speakers in North America. He is the founder of TrendHunter.com, the world’s largest trend website, boasting roughly 2 billion total views and 3 million fans. Prior to Trend Hunter, Jeremy grew a $1 billion portfolio for a bank, and today, over 300 brands, billionaires and CEOs rely on his innovation expertise and management consulting, including Victoria Secret, Coca-Cola, Sony, IBM, NBC, Wells Fargo and Hughes Aerospace.

2:00 – 2:15 p.m.  Networking Break/Exhibits

2:15 – 3:15 p.m.  Session IV - “What Do Investors Really Need to Know - Best Practices in Reporting & Communication with Clients”
Chris Jepson, Senior Legal Counsel, Ontario Securities Commission
Susan K.D. Bell, Executive Vice President, Bell Kearns & Associates Ltd.
Davis Walmsley, Vice President, Investment Management, Greenwich Associates

With the emergence of further regulation and oversight from regulators, reporting and communication with clients has become a major issue for asset managers. Clients and regulators are demanding more transparency on performance, management fees and for tax reporting. What are investors really looking for from asset managers? What are the essential regulatory requirements you need to meet? What is changing in terms of reporting and communication? Is technology a hindrance or a saviour? This session will explore the changing landscape in client communication and debate best practices for institutional versus private clients.

3:15 – 4:15 p.m.  Session V - “Asset Allocation from the Investment Manager Perspective”
David L. Donabedian, Chief Investment Officer, Atlantic Trust
Mark Rodger, Senior Portfolio Manager, Total Portfolio Management Group, CPPIB
Michael Wissell, SVP, Public Equities, Ontario Teachers’ Pension Plan

A few years post crisis, asset managers are fine-tuning their asset allocation strategy, armed with a better understanding of liquidity and risk issues recently brought to light. What are the trends in asset allocation among private and institutional managers? What are the similarities and differences? How are portfolio mixes being modified to balance liquidity with return? This diverse panel will provide a mixture of perspectives on current and projected trends in asset allocation.

4:15 – 4:20 p.m.  Concluding Remarks

4:20 – 6:00 p.m.  Cocktail Reception
The following registration form can be submitted to PMAC for processing via:

- Email: ebushell@portfoliomanagement.org
- Regular Mail: 155 University Avenue, Suite 1210, Toronto, Ontario, M5H 3B7

You can also register online for this event at:
http://www.portfoliomanagement.org/2014/07/annual-conference-registration/

Registration Information

Attendee 1 Name: 

Attendee 2 Name: 

Company: 

Email: 

Telephone: 

Address: 

City:   Province:   Postal Code:   

Special needs (i.e. accessibility, diet): 

Fee & Payment Information

NOTE: The registration fee for the PMAC National Conference and AGM includes all session materials, breakfast, lunch, refreshment breaks and cocktails. Attendees are responsible for their own hotel accommodations. Discounted room rates are available at the Hilton Hotel Toronto. Please phone 416-869-3456 and request the Portfolio Management Association of Canada discount.

Membership Category  Payment Options
- Member – $390 CAD + HST  X  (number of attendees)  - Cheque enclosed
- Non-Member – $540 CAD + HST  X  (number of attendees)  - Please invoice me

Cancellations

Cancellations must be received via email to ebushell@portfoliomanagement.org by November 11, 2014 5:00 PM EDT. After November 11, no refunds will be issued; however delegate substitution is permitted up to, and including, the day of the conference. If you register for the conference and do not attend, you are responsible for the full registration fee.