



“Building for the Future Together”

PMAC National Conference

Thursday, November 15th, 2018
Sheraton Centre | Toronto



8:30 am - 9:00 am

Registration & Breakfast, Exhibitors' Area Opens

Sponsored by:



RBC Investor & Treasury Services

9:00 am - 9:05 am

Welcome & Opening Remarks

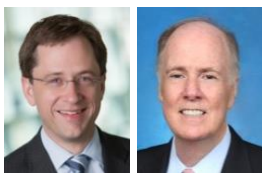


Carol Lynde, President & Chief Operating Officer, Bridgehouse Asset Managers
Katie Walmsley, President, Portfolio Management Association of Canada

9:05 am - 10:15 am

Session I - Geopolitical Risk Highlights

Former National Security Adviser to President of the United States, Barack Obama, Thomas Donilon, will provide an update to his 2017 session discussing insights on geopolitical risks currently facing asset managers. Mr. Donilon will address risks ranging from US/China relations, global trade tensions, cyber attacks, North Korea, Russia/NATO tensions, Gulf tensions and more. Moderated by Kurt Reiman, this session will discuss these interconnected issues and their potential impact on industry and markets.



Moderator: Kurt Reiman, Chief Investment Strategist, BlackRock Canada

Thomas Donilon, served as National Security Advisor to Former President of the United States, Barack Obama

10:15 am - 10:45 am

Networking Break & Exhibit Viewing

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10:45 am - 12:00 pm

Session II - Market Outlook

Ten years ago Lehman Brothers filed for bankruptcy. What's the state of markets now and where are markets heading? Brian Belski, Chief Investment Strategist with BMO Capital Markets will share his observations on the economy and the infatuation with calling the end of the bull market.



Brian Belski, Chief Investment Strategist, BMO Capital Markets

12:00 pm - 2:00 pm

Luncheon Keynote - "My Stories, My Times" – A Conversation with the Right Honourable Jean Chrétien



The Right Honourable Jean Chrétien
Althia Raj, Ottawa Bureau Chief, HuffPost Canada

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2:00 pm - 2:15 pm

Networking Break & Exhibit Viewing

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2:15 pm – 3:15 pm

Session IV – Fintech Hot Topics Panel - Data, AI, and Privacy

Technology disrupters are changing the industry and impacting firms. Technology, its application and adoption is what will shape the future. This panel will examine practical technology matters and opportunities for expansion.



Moderator: Nadir Hirji, Partner Strategy& and Lead Digital Services, PricewaterhouseCoopers Canada



Neil Bunn, Manager, Customer Engineering, Google Cloud Canada

Adam Kardash, Partner, Osler, Hoskin & Harcourt LLP

Eric Lapham, Senior Vice President, Global Head of Sales, State Street Global Exchange



Malcolm White, Portfolio Manager, Signature Global Asset Management

3:15 pm – 3:30 pm

Networking Break & Exhibit Viewing

3:30 pm – 4:45 pm

Session V – M&A Succession Planning & Execution

Planning for the partial or full purchase or sale of a Portfolio Management Firm requires long term planning and careful execution. Hear from a panel of experts about best practices in managing the process from beginning to end, options to consider, personal experiences and key considerations for smooth transitions. Lucas Pontillo, Executive Vice President and Global Chief Financial Officer of Fiera Capital Corporation will moderate this lively final panel of the conference.



Moderator: Lucas Pontillo, Executive Vice President & Global Chief Financial Officer, Fiera Capital Corp.

Don Cranston, Senior Vice President & Investment Counsellor, Fiera Capital Corp.



Oliver Murray, Managing Director, Portfolio Management & Client Services, Brandes Investment Partners L.P.

Colin Walker, Managing Director, Crosbie & Company Inc.

4:45 pm – 4:50 pm

Concluding Remarks

5:00 pm

Cocktail Reception

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