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Tuesday, November 20 | Ritz-Carlton Hotel, Toronto

8:00 am – 8:50 am Registration and Breakfast
8:50 am – 9:00 am Welcome by emcee **Rob McCullagh**
9:00 am – 9:15 am Opening Remarks by **Greg Pollock**

9:15 am – 10:30 am – **A Path Chosen: The CSA's Stand on Commissions and Reforms**

Session introduction:

Duane Green, President and CEO, Franklin Templeton

Speakers:

Debra Foubert, Director, Compliance and Registrant Regulation,
Ontario Securities Commission

Neil Gross, President, Component Strategies Consulting

Dennis Tew, Head of National Sales, Franklin Templeton

Moderator: Greg Pollock, President and CEO, Advocis

10:30 am – 10:50 am **COFFEE BREAK**

10:50 am – 12:05 pm – **The Ethics of AI and Fintech**

Speakers:

Chelsey Colbert, Associate, Fasken

Chadi Habib, Executive Vice President, Information Technology, Desjardins Group

James Leong, Senior Legal Counsel, BC Securities Commission

Moderator: Jean-François (J-F) Démoré, CFP, CIM, MBA, Advocis Technology Task Force

12:05 pm – 1:00 pm **LUNCH BREAK**



1:00 pm – 2:00 pm

Special 10th Anniversary Keynote Speaker
Be Comfortable With Uncomfortable

Session introduction:

Kris Birchard, BA, CLU, C.H.F.C.,
Chair, Advocis Government Relations Committee

Speaker:

Michael Hyatt, Celebrated “Dragon”, CBC Online Next Gen Den

2:00 pm – 3:15 pm – **Insuretech**

Session introduction:

Jim Brownlee, CFP, CLU, Ch.F.C., Vice President of Managing General Agency
Partnerships, Canada Life Assurance Company

Speakers:

Kelly Gustafson, National Director, Sales Innovation, IDC Worldsource Insurance Network Inc.

Jonathan Hoss, Vice President, Innovation, Great-West Life

Hélène Samson, Director, Prudential Oversight of Financial Institutions, AMF and
Chair, CCIR Fintech Working Group

Moderator: Chuck Grace, CPA, CMA, CMC, HBA Faculty Director, Ivey Field Project

3:15 pm – 3:35 pm **COFFEE BREAK**

3:35 pm – 4:05pm – **The High Performing Professional**

Speaker:

Jim Ruta, BA, RHU, EPC, Coach, Communicator, Consultant

4:05 pm – 4:15 pm – **Special Guest Speaker**

Session introduction:

Al Jones, CFP, CLU, ACCUD, ICD.D,
Chair, Advocis National Board of Directors

Speaker:

The Honourable Vic Fedeli, Ontario's Minister of Finance

4:15 pm – **Closing**

4:15 pm – 6:00 pm **COCKTAIL RECEPTION**

