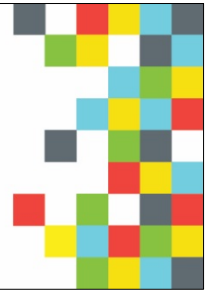


2021 IFIC ANNUAL LEADERSHIP CONFERENCE



<p>1:00 p.m. – 1:15 p.m.</p>	<p>Welcoming Remarks</p> <p>Bruce Sellery, Business Journalist and Conference Emcee</p> <p>Rick Headrick, President, Capital International Asset Management (Canada) and IFIC Board Chair</p>
<p>1:15 p.m. – 2:15 p.m.</p> <p>FIRESIDE CHAT WITH LOUIS MORISSET</p> <p>AMF CEO and CSA Chair Louis Morisset will join IFIC’s CEO Paul Bourque for a conversation about the regulatory landscape in Canada. In addition to reflections on how the regulators have adapted through the pandemic, their discussion will cover key developments at the regulator, as well as updates on their initiatives and key priorities. SRO consolidation, CFRs, regulatory burden reduction, full cost disclosure – there will be many topics to address.</p>	<p>Paul Bourque, President and CEO, IFIC</p> <p>Louis Morisset, President and CEO, Autorité des marchés financiers</p>
<p>2:15 p.m. – 2:25 p.m.</p>	<p>Break</p>
<p>2:25 p.m.- 2:40 p.m.</p> <p>2021 POLLARA INVESTMENT FUND RESEARCH REPORT</p> <p>Pollara Strategic Insights Vice President, Lesli Martin, will share findings from the 2021 survey of mutual fund and ETF investors.</p> <p>This survey has been tracking investor attitudes, expectations and understanding since its inception in 2006. The 2021 survey features insights on a number of topics including, confidence in mutual funds and ETFs, the advisory relationship, the experience of the modest investor, the impact of COVID-19 on investors, attitudes toward responsible investing, fee knowledge and understanding, and satisfaction with fee and performance statements.</p>	<p>Lesli Martin, Vice President, Pollara Strategic Insights</p>

2:40 p.m. – 3:40 p.m.

CANADIAN LEADERS PANEL

The findings of the 2021 Pollara Mutual Fund and ETF Investor Survey will provide the starting point for the Leaders Panel's discussion about key trends in the Canadian market. Our panel of industry experts will reflect on how the investment funds industry has evolved over the last unprecedented year of change and disruption. Are "temporary" fixes and accommodations now permanent? The panel will also explore the impact of technology and regulatory reform on the advisory relationship and what lies ahead.

Moderator:

[Clare O'Hara](#), Reporter, The Globe and Mail

Panelists:

[Bruce Cooper](#), CEO, TDAM, SVP, TD Bank Group

[Judy Goldring](#), President and Head of Global Distribution, AGF

[Roy Ratnavel](#), EVP, Head of Distribution, CI Global Asset Management

3:40 p.m. - 3:50 p.m.

BREAK

3:50 p.m. – 4:50 p.m.

ESG: A GLOBAL PERSPECTIVE ON REGULATION AND MARKET TRENDS

Against a backdrop of a global pandemic, a U.N. climate report calling code red for humanity, and a renewed focus on issues of diversity, equity and inclusion, ESG issues are at the forefront of investor concern. This panel brings together industry leaders from Europe, the US and Canada to discuss market trends at the forefront of ESG investing, critical regulatory developments, and how the industry is responding.

Moderator:

[Frederick Pinto](#), SVP, Head of Asset Management, Aviso Wealth

Panelists:

[Sean Hagerly](#), Managing Director, Europe, Vanguard

[Jon Hale](#), Global Head of Sustainability Research, Morningstar

[Fate Saghir](#), Head, Sustainable Investing, Mackenzie Investments

4:50 p.m. – 5:00 p.m.

Closing Remarks

[Paul Bourque](#), President and CEO, IFIC