



Wednesday, September 13th

8:30 – 2:30	<p>GOLF – THUNDERING WATERS NIAGARA FALLS <i>(Complimentary with paid registration; Limited spots available)</i></p> <p>Thundering Waters is John Daly's first "Signature" golf course in Canada. The golf course features the high risk-reward style of John Daly to enhance the excitement for players of all skill levels. Thundering Waters combines the parkland tranquility of Augusta National and the wind swept dunes of heartlands British Open Championship golf. Sweeping fairways, undulating greens, sculpted bunkers and meandering creeks, all nestled between towering trees and mighty dunes combine to create a true masterpiece. Thundering Waters was voted Best Course in Niagara by Readers Choice.</p> <p>8:30AM SHOTGUN START</p> <ul style="list-style-type: none"> • Welcome gifts for all participants, including sleeve of balls, casino chip ball marker • Complimentary cigars at check in • 18 holes with cart • 3 contest holes including longest drive, closest to the pin, and closest to the barrel with ALL prizes provided by the course • Pepsi refresh zone • Post round BBQ lunch featuring burgers and sausages, and salads
3:00 – 5:00	<p>CONFERENCE REGISTRATION –</p>
4:00 – 5:00	<p>THE 2017 WAIS CANADA CEO/CIO ROUNDTABLE <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</i> <i>Martin Braun, Senior Investment Strategist, JC Clark Ltd.</i> <i>Joe Canavan, President & CEO, LOGiQ Asset Management</i> <i>James Fox, Managing Partner, SPR & Co LP</i> <i>Mark Purdy, Managing Director & CIO, Arrow Capital Management Inc.</i></p> <p>New for 2017! The WAIS Canada CEO/CIO Roundtable will provide an opportunity for delegates to hear from top executives of Canada's leading alternative asset managers, on the key issues, challenges and opportunities facing their organizations and investment portfolios – including:</p> <ul style="list-style-type: none"> • investment risks and how to mitigate • opportunities in the current market environment – sectors, regions • investment outlook • market outlook
5:00 – 6:30	<p>RADIUS' WELCOMING LAUNCH RECEPTION <i>(Port Colborne Lounge, Scotiabank Convention Centre)</i> <i>SPONSORED BY: RADIUS FINANCIAL EDUCATION</i></p>

Thursday, September 14th

7:30 – 8:20	<p>CONFERENCE REGISTRATION AND BREAKFAST <i>SPONSORED BY: CIFP</i></p>
-------------	---

*Please note that, while every effort will be made to present the program as advertised, speakers, topics and timing are subject to change due to circumstances beyond our control.
*Radius Financial Education ("RFE") is pleased to provide the Fund Manager and EMP Showcase segments of the Summit for industry gathering. RFE's role is simply as a conference medium for hedge funds and alternative investments. RFE does not provide advice or investment recommendations and our facilitation of the product Showcase segments of the Summit should not be misconstrued as a recommendation from RFE regarding investing specifically in any of the funds showcased.



8:20 – 8:30	<p>OPENING REMARKS - (Ballroom C+D) <i>Pat Bolland, Former BNN Anchor, Media Consultant</i></p>
8:30 – 9:10	<p>FEATURE PRESENTATION: (Ballroom C+D) THE EVOLUTION OF THE ETF MARKET IN CANADA – RECENT DEVELOPMENTS AND TRENDS <i>Daniel Straus, Vice President, ETFs & Financial Products Research, National Bank Financial</i> The market for ETFs has grown rapidly in the past two decades, tilting the balance of power in favor of investors. ETFs are now utilized by a growing number of fund managers for tactical asset allocation, completion strategies, and as a liquid cash substitute, their attractiveness underpinned by their relatively lower costs, speed of execution, and transparency. The market is now entering a new phase of growth as providers enter the space to enhance potential returns by offering actively managed ETFs, but these may have higher tracking errors and debatable outperformance compared with the older passive ETF structures.</p> <p>In this session, Daniel will examine the growth of the market, the pros and cons of the newer ETF products, and the competitive dynamics of the ETF industry. Daniel will also share highlights from his team’s model portfolio construction and analysis process.</p>
9:10 – 9:50	<p>DEBATE: ARTIFICIAL INTELLIGENCE WILL REPLACE STOCK PICKING PORTFOLIO MANAGERS SOONER THAN YOU THINK? (Ballroom C+D) <i>Speaker of the House: Hugh Innes, Managing Director, Logan Wealth Management</i> <i>Doug Steiner, CEO, Evree Corp.</i> <i>Kim Shannon, President and Co-CIO, Sionna Investment Managers</i></p>
9:50 – 10:30	<p>THE CHALLENGES OF FORMULATING A GLOBAL ECONOMIC OUTLOOK IN THE AGE OF VOLATILE POLITICS AND POLICY – Panel Discussion (Ballroom C+D) <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</i> <i>Joseph Thomson, Director, President & CEO, PACE Capital Management</i> <i>Kevin Harris, Director, North America, Continuum Economics</i> A wide-ranging discussion of issues facing the Canadian, US and global economies in a fast changing world of politics and policy. Topics will range from the current state of U.S. economy, the Canadian housing finance and housing markets, possible renegotiation of NAFTA and the relative roles of monetary and fiscal policy.</p>
10:30 – 10:50	<p>NETWORKING BREAK – <i>SPONSORED BY: NATIONAL BANK CORRESPONDENT NETWORK</i></p>
10:50 – 12:00	<p>FUND MANAGER SHOWCASE - (Ballroom C+D) Traditional fund managers are looking to alternative strategies as more of a mainstream opportunity for their investors. Hear directly from fund managers discussing their products, theories and strategies. <i>Moderated by: Harvey Sliwowicz, National Vice President, Business Development & Relationship Management, National Bank Correspondent Network</i></p> <ul style="list-style-type: none"> • CoPower – Trish Nixon, Chief Impact Investing Officer • Indigoblue MIC – Harry Singh, President & CEO • Northern Coast Financial – Thomas Jones, President & CEO • OurCrowd – David Shore, Director - Canada • PACE Capital Management – Joseph Thomson, Director, President & CEO • R2 Investments – Amar Nijjar, Founder • RISE Properties Trust – Peter Figura, Director, Sales • RiverRock Mortgage Investment Corp. – Nick Kyprianou, President & CEO
12:00 – 1:00	<p>BUFFET LUNCH (Exhibit Hall) <i>SPONSORED BY: STATE STREET GLOBAL ADVISORS SPDR</i></p>

*Please note that, while every effort will be made to present the program as advertised, speakers, topics and timing are subject to change due to circumstances beyond our control.
*Radius Financial Education ("RFE") is pleased to provide the Fund Manager and EMP Showcase segments of the Summit for industry gathering. RFE's role is simply as a conference medium for hedge funds and alternative investments. RFE does not provide advice or investment recommendations and our facilitation of the product Showcase segments of the Summit should not be misconstrued as a recommendation from RFE regarding investing specifically in any of the funds showcased.



<p>12:20 – 1:00</p>	<p>LUNCH SESSION INSTITUTIONAL USES OF EXCHANGE TRADED FUNDS <i>Bobby Eng, Vice President, State Street Global Advisors, Ltd. & Head, SPDR ETF Business Development for Canada</i> Institutional flow into ETFs is expected to grow to \$300B annually by 2020 as institutional investors continue to use ETFs in a variety of different strategies. Learn about the most popular institutional strategies of ETFs and gain knowledge on how these strategies can be applied to investment portfolios. Gain perspective on:</p> <ul style="list-style-type: none"> • The current Global ETF market and the expected future growth • Incorporating institutional ETF strategies as portfolios management tools • Liquidity concerns fueling the demand for fixed income ETFs • Institutional ETF investment trends and fund flows 	
	<p>Stream 1 – (Ballroom C+D)</p>	<p>Stream 2 – (Ballroom B)</p>
<p>1:00 – 1:40</p>	<p>INVESTING IN VENTURE CAPITAL – SHINING A LIGHT ON A MYSTERIOUS BLACK BOX – PANEL DISCUSSION (Ballroom C+D) <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</i> <i>Chris Beall, CEO, ConnectAndSell, Inc.</i> <i>Rubsun Ho, Chief Crowdpleaser, Crowdmatrix Inc.</i> <i>David Shore, Director – Canada, OurCrowd</i> Opportunities for Canadians to invest in early stage technology companies through venture capital funds are more plentiful than ever. The panel will discuss how venture capital funds are structured, carried interest, hurdle rates, funding rounds and risk management. The session will also cover the hot sectors and the emergence of the Toronto-Waterloo corridor as the source of the next generation of great Canadian technology companies.</p>	<p>REGULATION HOT TOPICS (Ballroom B) <i>Moderated by: Charbel Cheaib, Executive Director, Business Development, CIBC Mellon</i> <i>Dennis MacPherson, Senior Vice President, SGGG Fund Services</i> <i>Tony Mahabir, CEO, Canfin Financial Group</i> <i>Darin Renton, Partner, Stikeman Elliott LLP</i> The securities regulatory regime in Canada continues to expand rapidly. The panel will address the current key changes and issues facing investment advisors, portfolio managers, investment fund managers and exempt market dealers.</p>
<p>1:40 - 2:20</p>	<p>REAL ESTATE INVESTING: BUBBLE OR BEST INVESTMENT EVER? – PANEL DISCUSSION (Ballroom C+D) <i>Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</i> <i>David Kirzinger, Principal, RISE Properties Trust</i> <i>Amar Nijjar, Founder, R2 Investments</i> <i>Lijoy Ulahannan, COO, Highyon Accredited Realty Partners</i> Hear from leading fund managers on their views of the real estate markets in Canada and the US – is there a real estate bubble?</p>	<p>PRIVATE NON-BANK LENDING SPACE – PANEL DISCUSSION (Ballroom B) <i>Moderated by: Zachary Schwartz, President, ZSC Inc.</i> <i>Matt Barnes, Director of Sales, Centurion Asset Management</i> <i>Ron D’Vari, Chairman, CIO & Co-Founder, NewOak Capital LLC</i> <i>Trish Nixon, Chief Impact Investing Officer, CoPower</i> The nonbank finance sector is an alternative asset class that many investors have looked to for diversification, current cash flow and a reasonable risk-weighted return. The panel will explore the various loan types such as consumer credit, asset-based finance, corporate lending and project financing, as well as the risks and rewards of each and the impact of technology on the sector.</p>

*Please note that, while every effort will be made to present the program as advertised, speakers, topics and timing are subject to change due to circumstances beyond our control.
 *Radius Financial Education ("RFE") is pleased to provide the Fund Manager and EMP Showcase segments of the Summit for industry gathering. RFE's role is simply as a conference medium for hedge funds and alternative investments. RFE does not provide advice or investment recommendations and our facilitation of the product Showcase segments of the Summit should not be misconstrued as a recommendation from RFE regarding investing specifically in any of the funds showcased.



<p>2:20 - 3:00</p>	<p>INTERNATIONAL GIVING: WHAT YOU NEED TO KNOW – PANEL DISCUSSION (<i>Ballroom C+D</i>) Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant Howard English, Director, CAF Canada Ted Hart, President, CAF Canada Mo Lidsky, Partner & Senior Managing Director, Prime Quadrant The panel will address the following aspects of international giving:</p> <ul style="list-style-type: none"> • Myths & Realities • CRA considerations • A global look at giving needs & opportunities • The Benefits of Incorporating Philanthropy in Client Engagements • Actual examples of funded CAFC projects/how we overcame challenges • A look ahead at Canada's evolving philanthropic environment 	<p>THE CONTINUED GROWTH IN MORTGAGE INVESTMENT CORPORATIONS – PANEL DISCUSSION (<i>Ballroom B</i>) Moderated by: Tim Brown, Managing Director, Strategic Information Technology Nick Kyprianou, President & CEO, RiverRock MIC Dawn Paniz, CFO & Senior Vice President, Investment Markets, Fisgard Capital Corporation Harry Singh, President & CEO, Indigoblue MIC Henry Tse, CEO, Ginkgo MIC</p> <p>Private mortgage investment corporations have seen spectacular growth in the past couple of years in Canada, and especially in Ontario, fueled by the continued rise of the real estate industry. The panel will examine the source of this growth, whether it is sustainable, the risks of investing in MICs and how to minimize them.</p>
<p>3:00 – 3:20</p>	<p>NETWORKING BREAK – SPONSORED BY: ROYAL CANADIAN MINT</p>	
<p>3:20 – 4:30</p>	<p>FUND MANAGER SHOWCASE - (<i>Ballroom A+B</i>) Traditional fund managers are looking to alternative strategies as more of a mainstream opportunity for their investors. Hear directly from fund managers discussing their products, theories and strategies. Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant</p> <ul style="list-style-type: none"> • Centurion Asset Management – Matthew Barnes, Director of Sales • ConnectAndSell – Chris Beall, CEO • Crowdmatrix Inc. – Rubsun Ho, Chief Crowdpleaser • Fisgard Capital Corporation – Dawn Paniz, CFO & Senior Vice President, Investment Markets • Ginkgo MIC – Henry Tse, CEO/CFO • Highyon Accredited Realty Partners – Lijoy Ulahannan, Chief Operating Officer • LionGuard Capital Management – Andrey Omelchak, President and Chief Investment Officer • NOLA FIN – Ron D’Vari, Chairman, CIO and Co-Founder, NewOak Capital LLC 	
<p>4:30 – 5:10</p>	<p>ETFs: DISRUPTION OF THE TRADITIONAL ACTIVE MANAGEMENT SPACE – PANEL DISCUSSION (<i>Ballroom A+B</i>) Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant Deborah Frame, President & Chief Investment Officer, Frame Global Asset Management Andrey Omelchak, President & Chief Investment Officer, LionGuard Capital Management Jaime Purvis, Executive Vice President, National Accounts, Horizons ETFs Management (Canada) Inc. The use of ETFs by retail and institutional investors in Canada and elsewhere to achieve strategic portfolio management goals continues to grow significantly. While ETFs were historically used as tools for tactical portfolio adjustments, they are now also being used to achieve passive exposures in the ‘core’ components of core/satellite portfolio structures. Moreover, the highest ETF growth segment are ETFs that incorporate active strategies, encroaching on the turf of active asset managers. Our panel will provide an update from last year’s discussion at WAIS, with a focus on major new developments, and a ‘deeper dive’ into areas such as fixed income, equity, smart beta and other factor ETFs, risk reduction and trading.</p>	

*Please note that, while every effort will be made to present the program as advertised, speakers, topics and timing are subject to change due to circumstances beyond our control.
 *Radius Financial Education (“RFE”) is pleased to provide the Fund Manager and EMP Showcase segments of the Summit for industry gathering. RFE’s role is simply as a conference medium for hedge funds and alternative investments. RFE does not provide advice or investment recommendations and our facilitation of the product Showcase segments of the Summit should not be misconstrued as a recommendation from RFE regarding investing specifically in any of the funds showcased.



5:10	CLOSING REMARKS (Ballroom A+B) <i>Pat Bolland, Former BNN Anchor, Media Consultant</i>
5:10 – 6:40	EVENING RECEPTION – THE ROARING TWENTIES (Ballroom C+D) <i>SPONSORED BY: RADIUS FINANCIAL EDUCATION</i> Come join us and your industry friends for some good old fashioned fun as we go back in time to the 1920's. Get ready for some great jazz music, cocktails & hors d'oeuvres!

Friday, September 15th

7:30 – 8:20	BREAKFAST – <i>SPONSORED BY: HORIZONS EXCHANGE TRADED FUNDS</i>
8:20 – 8:30	<i>Pat Bolland, Former BNN Anchor, Media Consultant</i>
8:30 – 9:20	THE CANADIAN ENERGY SECTOR – CHANGING POLICIES, RISKS AND OPPORTUNITIES (Ballroom C+D) <i>F.L. (Ted) Morton, Senior Fellow, School of Public Policy, University of Calgary Former Alberta Minister of Energy and Minister of Finance</i> The oil and gas industry is uniquely important to the Canadian economy, accounting for over 20% percent of Canada's total net exports. New governments in Alberta and Canada in 2015 and in the US in 2017 mean new policies affecting Canada's energy sector. This session will address the risks and opportunities of these policy changes, including <ul style="list-style-type: none"> Ottawa's approval of the Trans-Mountain pipeline, Enbridge Line 3 and rejection of Northern Gateway Canadian crude oil tanker moratorium off BC north coast Prospects for the Canada East pipeline project Diverging Canadian Climate-change policies: carbon taxes versus cap-and-trade Prospects for US approval of the Keystone pipeline Changing US policies on fracking, drilling on federal lands and climate change, and their impact on Canada
9:20 – 9:50	UNCOVERING CREDIT OPPORTUNITIES IN A LOW YIELD ENVIRONMENT (Ballroom C+D) <i>Interviewed by: Pat Bolland, Former BNN Anchor, Media Consultant Andrew Mystic, Portfolio Manager & Director of Private Client, RP Investment Advisors</i> Andrew will touch upon active credit strategies and current opportunities in global credit markets.
9:50 – 10:30	THE DEVELOPED ECONOMIES RIP (RETIREMENT IS POSTPONED) (Ballroom C+D) <i>Alex Jurshevski, Founder, Recovery Partners</i> In what is sure to be a lively presentation, Mr. Jurshevski will address some of the most important issues of the day, and challenge some conventional thinking. <ul style="list-style-type: none"> Was the 2008/9 rescue effective? Has QE been a good idea? Are we now in a durable Recovery or is the Gig Economy here to stay? Are Current debt loads sustainable? How is the economy managing to eke out growth? Are we building up for another Meltdown? Is Trump a lame Duck or an "Orange Swan"? Is the G20 relevant? Will the UK Brexit?

*Please note that, while every effort will be made to present the program as advertised, speakers, topics and timing are subject to change due to circumstances beyond our control.
*Radius Financial Education ("RFE") is pleased to provide the Fund Manager and EMP Showcase segments of the Summit for industry gathering. RFE's role is simply as a conference medium for hedge funds and alternative investments. RFE does not provide advice or investment recommendations and our facilitation of the product Showcase segments of the Summit should not be misconstrued as a recommendation from RFE regarding investing specifically in any of the funds showcased.



10:30 – 11:20	<p>BLOCKCHAIN TECHNOLOGY, CRYPTOCURRENCIES, CYBERSECURITY, INTERNET OF THINGS, BIG DATA – THE BRAVE NEW WORLD IS HERE (<i>Ballroom C+D</i>) Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant Mat Cybula, CEO, Cryptiv Inc. Geoffrey King, Founder, BridgeDXi Americas Ron Quaranta, Chairman, Wall Street Blockchain Alliance</p> <p>Technology is moving so quickly, and in so many directions, that it becomes challenging to pay attention – yet blockchain technology advancement continues to drive economic growth and, in many cases, unleash disruptive change. Huge advances are being made on many fronts – automation of knowledge, the internet of Things (IoT), advanced robotics, next generation genomics, energy storage, to name but a few. There will continue to be ongoing disruptions to established norms, and there will be broad societal challenges – but also immense opportunities. Advances will transform life, business and the global economy.</p>
11:20- 11:40	<p>NETWORKING BREAK – SPONSORED BY: <i>IFSE INSTITUTE</i></p>
11:40 - 12:40	<p>KEYNOTE PRESENTATION: (<i>Ballroom C+D</i>) Darryl Strawberry, Co-Founder, Darryl Strawberry Recovery Center</p> <p>Darryl Strawberry is described as a legend by many who have been dazzled by the dynamics of his game, the power he possessed at the plate and the story of redemption that continues to bring hope to so many lives.</p> <p>He has earned the legendary nicknames and phrases of one of the most feared homerun hitters in the game of baseball, Straw’s Sweet Swing, Strawberry’s Field Forever and The Legendary Straw Man!</p>
12:40 – 12:50	<p>CLOSING REMARKS Pat Bolland, Former BNN Anchor, Media Consultant</p>

*Please note that, while every effort will be made to present the program as advertised, speakers, topics and timing are subject to change due to circumstances beyond our control.
*Radius Financial Education ("RFE") is pleased to provide the Fund Manager and EMP Showcase segments of the Summit for industry gathering. RFE's role is simply as a conference medium for hedge funds and alternative investments. RFE does not provide advice or investment recommendations and our facilitation of the product Showcase segments of the Summit should not be misconstrued as a recommendation from RFE regarding investing specifically in any of the funds showcased.