

Morningstar Investment Conference Agenda

June 6, 2012 | The Carlu, Toronto

Time and Session	Speakers
8:00–8:45 Registration, breakfast and exhibits	Breakfast sponsored by Middlefield Group
8:45–8:55 Opening remarks	Scott Mackenzie, President and CEO Morningstar Canada
8:55–10:10 Where in the world to invest: The big picture Today's slow-growth economy, still feeling the effects of the savage recession that sent equity markets reeling several years ago, is testing the resolve of investors and their advisors. Discussing the long-term secular trends, as well as shorter-term tactical opportunities to be considered when assessing the right asset mix for clients, are a macroeconomic strategist and tactician for one of the world's largest fund managers, the chief economist of one of the Big Five banks, and Morningstar Canada's Fund Manager of the Decade.	Eric Bushell, Chief Investment Officer, Signature Global Advisors division of CI Investments Inc. Jurrien Timmer, Director of Global Macro, Fidelity Management & Research Co. Eric Lascelles, Chief Economist, RBC Global Asset Management Inc.
10:10–10:30 Networking and exhibits	
10:30–11:15 The global search for yield A demographic wave of aging and risk-averse investors grows ever hungrier for income. Yet the mainstream bond markets offer the most miserly of yields. A global fixed-income manager will assess the best prospects for investors across the credit-risk spectrum, around the world, and in less known specialty niches.	Daniel S. Janis, Senior Managing Director, Manulife Asset Management (U.S.), LLC.
11:15–12:00 Practice management: Moneyball for advisors Randy Ambrosie says advisors and their firms should play their own brand of Moneyball to gain a deeper understanding about their clients. Are they satisfied and loyal? Do you manage some or all of their financial assets? Which clients provide referrals and why? What does a good referral sound like? Find out from this industry veteran and practice-management coach.	Randy Ambrosie, President and CEO, Accretive Advisor

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12:00–12:45 Lunch and exhibits	Lunch sponsored by Middlefield Group
12:45–13:30 Debate: Active versus passive investing Active investing costs more, and it doesn't necessarily work. Passive investing exposes investors to mispriced securities and irrational market sentiment. These are among the main arguments of the opposing investing camps. Two investment professionals will take sides as Morningstar presents its live version of this perennial debate.	Mary Anne Wiley, Managing Director Head of iShares Canada BlackRock Asset Management Canada Limited Sadiq Adatia, Chief Investment Officer, Sun Life Global Investments (Canada) Inc.
13:30–14:45 The changing landscape for advisors Has there ever been a more challenging time to be a financial advisor? Extreme market volatility has shaken investor confidence. New products and providers have entered the market, while others have disappeared. There are new requirements for investor protection, disclosure and suitability of investments. In this multi-speaker session, a leading fund-company executive, a top independent researcher on investor trends and one of Canada's self-regulatory leaders will discuss the changing landscape for advisors.	Goshka Folda, Senior Managing Director, Investor Economics Inc. Charles R. Sims, President and CEO, Mackenzie Financial Corp. Susan Wolburgh Jenah, President and CEO, Investment Industry Regulatory Organization of Canada (IIROC)
14:45–15:05 Networking and exhibits	
15:05–15:50 Global trends in investment funds Just as investing transcends borders, so too does the fund industry. Increasingly, giant global players are making their presence felt in Canada. Among the newer entrants is Vanguard, one of the world's biggest managers of investment funds. Vanguard's CEO will discuss global trends in products and distribution, and the importance of aligning the interests of fund managers, investors and financial advisors.	William McNabb, Chairman and CEO, Vanguard
15:50–15:55 Closing remarks	Scott Mackenzie, President and CEO, Morningstar Canada