

VISION 2023

LOOK AHEAD. STAY AHEAD.

Toronto in-person and virtual event

CLIENT AGENDA (AGENDA IS SUBJECT TO CHANGE) (as of September 30, 2022)

Tuesday, January 31, 2023

Time	Agenda
8:15 a.m.–9:00 a.m. ET	Conference registration and breakfast (in-person attendees) <i>Metro Toronto Convention Centre, North Building Constitution Hall, Rooms 105–106 255 Front Street West Toronto, Ontario M5V 2W6</i>
9:00 a.m.–9:05 a.m. ET	Welcome remarks David Bushnell, Senior Vice President, Advisor National Sales
Segment 1	
9:05 a.m.–9:35 a.m. ET	A CIO perspective and market outlook Andrew Marchese, Chief Investment Officer and Portfolio Manager
9:35 a.m.–10:05 a.m. ET	Fixed income investing in an evolving world Jeff Moore, Portfolio Manager Moderator: Kelly Creelman
10:05 a.m.–10:35 a.m. ET	Opportunities in small-cap investing Connor Gordon, Portfolio Manager Chris Maludzinski, Portfolio Manager Moderator: Pat Bolland
10:35 a.m.–10:50 a.m. ET	Break

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Tuesday, January 31, 2023 (continued)

Time	Agenda
Segment 2	
10:50 a.m.–11:20 a.m. ET	Finding alpha from top-down to bottom-up Ramona Persaud, Portfolio Manager Denise Chisholm, Director, Quantitative Market Strategy Moderator: Kelly Creelman
11:20 a.m.–11:55 a.m. ET	Lessons learned Will Danoff, Portfolio Manager Moderator: Pat Bolland
11:55 a.m.–1:00 p.m. ET	Extended break Lunch break (in-person attendees)
Segment 3	
1:00 p.m.–1:40 p.m. ET	Asset allocation highlights: A global perspective David Wolf, Portfolio Manager David Tulk, Portfolio Manager Ilan Kolet, Institutional Portfolio Manager Moderator: Kelly Creelman
1:40 p.m.–2:15 p.m. ET	Uncovering positive change in Canada and abroad Mark Schmehl, Portfolio Manager Moderator: Pat Bolland
2:15 p.m.–2:30 p.m. ET	Break

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Tuesday, January 31, 2023 (continued)

Time	Agenda
Segment 4	
2:30 p.m.–3:05 p.m. ET	Contrarian perspectives Hugo Lavallée, Portfolio Manager Moderator: Pat Bolland
3:05 p.m.–3:40 p.m. ET	Identifying opportunities in volatile periods Dan Dupont, Portfolio Manager Moderator: Pat Bolland
3:40 p.m.–3:50 p.m. ET	Closing remarks David Bushnell, Senior Vice President and Advisor, National Sales
3:50 p.m.–4:30 p.m. ET	Reception (in-person attendees) Foyer