

# 2 0 2 3 I G A P E X E X C H A N G E

## Time MDT **SUNDAY, SEPTEMBER 10**

	<b>Calgary Group Hosted Tours</b> Location: Guest Services, TELUS Centre, Main Level			
	<b>Horseback Ride at Boundary Ranch</b> 8:30 a.m. – 3:30 p.m.	<b>Kananaskis Nature Hike</b> 7:45 a.m. – 3:45 p.m.	<b>E Bike &amp; Brew Banff to Canmore</b> 8:00 a.m. – 3:45 p.m.	<b>Fly Fishing on the Bow River</b> 8:30 a.m. – 3:30 p.m.
11:00 a.m. – 5:00 p.m.	<b>Registration</b> Location: Exhibition Foyer			
2:00 – 4:00 p.m.	<b>Optional CE Credit Session – Insurance Solutions for High Net Worth Clients</b> Location: Glen 201-204			
5:15 – 5:45 p.m.	<b>Transfer to Girletz Ranch</b> Location: Guest Services, TELUS Centre, Main Level			
6:00 – 9:00 p.m.	<b>Welcome Reception</b> Location: Girletz Ranch			

## Time MDT **MONDAY, SEPTEMBER 11**

6:30 – 7:30 a.m.	<b>Wellness Program – Yoga</b> Location: Glen 205		<b>Wellness Program – Group Walk</b> Location: Guest Services, Main Floor	
7:00 – 8:15 a.m.	<b>Group Breakfast</b> Location: Exhibition D&X	<b>Black Advisory Group Breakfast</b> Location: TELUS 104-106	<b>First Time Attendee Breakfast – Invite Only</b> Location: Glen 201-204	
8:30 – 10:00 a.m.	<b>General Session 1</b> Location: Exhibition C Host: <b>Marty Minshull</b> , SVP Financial Services, IG Wealth Management			
	<b>Achieve More Together, IG 2023 Apex Exchange Opening &amp; CEO Update</b> <b>Damon Murchison</b> , President & CEO, IG Wealth Management			
	<b>Private Company Advisory</b> <b>David Turnbull</b> , SVP, Head of Private Company Advisory			
	<b>Creating a Best-in-Class Advice Experience with the Living Plan Portal</b> <b>Christine Van Cauwenberghe</b> , Head of Financial Planning & <b>Shawn Dupuis</b> , Senior Financial Consultant			

## Exchange Hub & Refreshments Location: Exhibition E

Braindates	Knowledge Circle 1 10:15 a.m.	Knowledge Circle 2 10:15 a.m.	Knowledge Circle 3 10:15 a.m.	Knowledge Circle 4 10:15 a.m.	Network Exchange
10:00 – 11:00 a.m.  Small topical group discussions.  A relaxed way to connect, seek out inspiration, and brainstorm with peers.	<b>Building an Ideal Team</b>  <b>Tom Van Tighem</b> , SVP Private Wealth Management <b>Nathan Giesbrecht</b> , Executive Financial Consultant	<b>Take Your Marketing to the Next Level</b>  <b>Claudia Dostal</b> , VP Marketing <b>Marissa Teeter</b> , Head of Advisor Experience Enablement <b>Lisa-Marie Winning</b> , Executive Financial Consultant <b>Treena Nault</b> , Certified Financial Planner	<b>How to Get the Most out of LPP</b>  <b>Christine Van Cauwenberghe</b> , Head of Financial Planning <b>Pieter Demeester</b> , Director, Living Plan Portal <b>Shawn Dupuis</b> , Senior Financial Consultant	<b>Introducing Private Company Advisory</b>  <b>David Turnbull</b> , SVP, Head of Private Company Advisory	Interactive displays and discussion opportunities with IG subject matter experts to discuss products, services or tools.

# 2 0 2 3 I G A P E X E X C H A N G E

Time MDT	MONDAY, SEPTEMBER 11					
11:10 a.m. – 12:35 p.m.	<b>General Session 2</b> Location: Exhibition C Host: <b>Marty Minshull</b> , SVP Financial Services, IG Wealth Management					
	<b>Developing a Path to Growth</b> <b>Ray Sclafani</b> , Founder & CEO, ClientWise					
	<b>Practice Profile: Managing Capacity and Productivity</b> <b>Bill Spence</b> , Senior Financial Consultant & <b>Tara Schneider</b> , Executive Financial Consultant Host: <b>Ray Sclafani</b> , Founder & CEO, ClientWise					
	<b>Go for the Gold!</b> <b>Dr. Hayley Wickenheiser</b> , Four-time Olympic Gold Medalist					
12:35 – 1:35 p.m.	<b>Group Lunch</b> Location: Exhibition D&X		<b>Women’s Lunch with Dr. Hayley Wickenheiser</b> Invite Only (Registration required/Limited Capacity) Host: <b>Esther Bast</b> , SVP Financial Services Fireside Chat with: <b>Marissa Teeter</b> , Head of Advisor Experience Enablement Location: Glen 201-204			
1:35 – 2:35 p.m.	<b>Exchange Hub &amp; Refreshments</b> Location: Exhibition E					
	<b>Braindates</b>	<b>Knowledge Circle 1</b> <b>1:50 p.m.</b>	<b>Knowledge Circle 2</b> <b>1:50 p.m.</b>	<b>Knowledge Circle 3</b> <b>1:50 p.m.</b>	<b>Knowledge Circle 4</b> <b>1:50 p.m.</b>	<b>Network Exchange</b>
	Small topical group discussions. A relaxed way to connect, seek out inspiration, and brainstorm with peers.	<b>Building an Ideal Practice</b> <b>Rob Nakoneshny</b> , VP Private Wealth Management <b>Bill Spence</b> , Senior Financial Consultant <b>Tara Schneider</b> , Executive Financial Consultant	<b>Private Wealth Planning Experience</b> <b>Jack Courtney</b> , VP Advanced Financial Planning <b>Nicholas Shields</b> , VP Private Wealth Management <b>Tracey Greenwood</b> , Executive Financial Consultant	<b>Mortgage and Banking Roadmap</b> <b>Shauna Clarke</b> , VP Mortgages & Banking Solutions <b>Treena Nault</b> , Certified Financial Planner	<b>IG Securities Platform Update</b> <b>Rheal Baillargeon</b> , AVP Securities Distribution	Interactive displays and discussion opportunities with IG subject matter experts to discuss products, services or tools.
2:45 p.m. – 3:55 p.m.	<b>General Session 3</b> Location: Exhibition C Host: <b>Marty Minshull</b> , SVP Financial Services, IG Wealth Management					
	<b>Industry Update</b> <b>Damon Murchison</b> , President & CEO, IG Wealth Management <b>Herp Lamba</b> , SVP Head of Advisor Practice Recruitment, IG Wealth Management <b>Shahrshad Rajabzadeh</b> , VP National Sales, IG Investments Tech Panel Host: <b>Annamaria Testani</b> , Head of Client & Advisor Experience featuring <b>Mark Evans</b> , CEO, Conquest Planning & <b>James Rockwood</b> , Founder & CEO, CapIntel					
5:00 – 7:00 p.m.	<b>Private Wealth Management Reception – Invite Only</b> Location: Saltlik Restaurant					
6:30 – 8:30 p.m.	<b>Free Evening</b>					

# 2 0 2 3 I G A P E X E X C H A N G E

Time MDT	TUESDAY, SEPTEMBER 12					
7:00 – 8:00 a.m.	<p align="center"><b>Group Breakfast</b> Location: Exhibition D&amp;X</p>					
8:15 – 10:15 a.m.	<p align="center"><b>General Session 4</b> Location: Exhibition C Host: <b>Jennifer Muench</b>, SVP Financial Services, IG Wealth Management</p>					
	<p align="center"><b>CEO Update</b> <b>James O'Sullivan</b>, President &amp; CEO, IGM Financial</p>					
	<p align="center"><b>Market Outlook</b> <b>Philip Petursson</b>, Chief Investment Strategist</p>					
	<p align="center"><b>Furthering Your Competitiveness with More Product Choice</b> <b>Shahrshad Rajabzadeh</b>, VP National Sales, IG Investments</p>					
	<p align="center"><b>Evolving the IG Mortgage Experience</b> <b>Alana Riley</b>, Head of Mortgage, Insurance &amp; Banking, IG Wealth Management &amp; <b>Malik Yacoubi</b>, Co-Founder &amp; CEO Nesto</p>					
	<p align="center"><b>Living a Life of Significance</b> <b>Joe Jordan</b>, Behavioral Finance Expert</p>					
10:15 – 11:15 a.m.	<p align="center"><b>Exchange Hub &amp; Refreshments</b> Location: Exhibition E</p>					
	<b>Braindates</b>	<b>Knowledge Circle 1</b> 10:30 a.m.	<b>Knowledge Circle 2</b> 10:30 a.m.	<b>Knowledge Circle 3</b> 10:30 a.m.	<b>Knowledge Circle 4</b> 10:30 a.m.	<b>Network Exchange</b>
	Small topical group discussions. A relaxed way to connect, seek out inspiration, and brainstorm with peers.	<b>Why iProfile?</b> <b>Caroline Egan</b> , IGWM District Vice President <b>Adam Jennings</b> , Division Manager	<b>Investment Portal Powered by CapIntel</b> <b>Brent Allen</b> , SVP Head of Strategy & Business OPs <b>James Rockwood</b> , CapIntel <b>Jason Blucke</b> , Executive Financial Consultant	<b>Integrating Life Insurance into Corporate Planning – and your Practice</b> <b>Steven McInnis</b> , Insurance and Estate Planning Specialist <b>Jatinder Sharma</b> , Executive Financial Consultant	<b>Thinking About Investment Strategy and Building a Client Portfolio</b> <b>Philip Petursson</b> , Chief Investment Strategist	Interactive displays and discussion opportunities with IG subject matter experts to discuss products, services or tools.
11:20 a.m. – 12:35 p.m.	<p align="center"><b>General Session 5</b> Location: Exhibition C Host: <b>Jennifer Muench</b>, SVP Financial Services, IG Wealth Management</p>					
	<p align="center"><b>Practice Profile</b> <b>Sean Wheeler</b>, Division Manager, IG Wealth Management</p>					
	<p align="center"><b>The Future is Better than You Think</b> <b>Peter Diamandis</b>, Executive Founder of Singularity University &amp; Founder and Executive Chairman of the XPRIZE Foundation</p>					
12:35 – 3:30 p.m.	<p align="center"><b>Free Time</b></p>					
	<p align="center"><b>Calgary Group Hosted Tours</b> Location: Guest Services, TELUS Centre, Main Level</p>			<p align="center"><b>RVP Lunch – Invite Only</b> Location: TELUS 101-102 <b>12:35 – 1:15 p.m.</b></p>		<p align="center"><b>Optional CE Credit Session - PWPE Case Study</b> Glen 201 - 204 <b>2:00 – 4:00 p.m.</b></p>
	<p align="center"><b>Craft Brewery</b> 1:30 – 5:00 p.m.</p>	<p align="center"><b>St. Patrick Island</b> 2:00 – 4:00 p.m.</p>	<p align="center"><b>Downhill Karting</b> 2:00 – 4:30 p.m.</p>	<p align="center"><b>RVP Session – Invite Only</b> Location: TELUS 104 -106 <b>1:15 – 5:00 p.m.</b></p>		
4:30 – 6:30 p.m.	<p align="center"><b>Free Time</b></p>					
6:15 – 11:30 p.m.	<p align="center"><b>IG Celebration Gala</b> Location: Exhibition C/D</p>					