

AGENDA | Toronto hybrid event

Metro Toronto Convention Centre, North Building
255 Front Street West | Toronto, Ontario | M5V 2W6
General Sessions: John W. H. Bassett Theatre

Wednesday, October 23, 2024

8:15 a.m. – 9:00 a.m. ET	Conference registration and breakfast (in-person attendees) <i>Advisors must first register and scan their QR code before attending breakfast.</i> <i>Registration table is in the pre-function area of the John W. H. Bassett Theatre</i>
9:00 a.m. – 9:05 a.m. ET	Welcome remarks David Bushnell, <i>Senior Vice President, Advisor National Sales</i>
Segment 1	
9:05 a.m. – 9:45 a.m. ET	Global asset allocation outlook SPEAKERS: David Wolf, <i>Portfolio Manager</i> David Tulk, <i>Portfolio Manager</i> Ilan Kolet, <i>Institutional Portfolio Manager</i>
9:45 a.m. – 10:25 a.m. ET	Dividend investing and downside protection SPEAKER: Ramona Persaud, <i>Portfolio Manager</i>
10:25 a.m. – 10:40 a.m. ET	Break
Segment 2	
10:40 a.m. – 11:20 a.m. ET	Thinking big with small caps SPEAKER: Connor Gordon, <i>Portfolio Manager</i>
11:20 a.m. – 12:00 p.m. ET	Fixed income now SPEAKERS: Jeff Moore, <i>Portfolio Manager</i> Michael Plage, <i>Portfolio Manager</i>
12:00 p.m. – 1:00 p.m. ET	Extended break Lunch break (in-person attendees)

Wednesday, October 23, 2024 (continued)

Segment 3

1:00 p.m. – 1:40 p.m. ET

A CIO perspective and market outlook

SPEAKER: Andrew Marchese, Chief Investment Officer and
 Portfolio Manager

1:40 p.m. – 2:20 p.m. ET

Lessons learned

SPEAKER: Will Danoff, Portfolio Manager

2:20 p.m. – 2:35 p.m. ET

Break

Segment 4

2:35 p.m. – 3:35 p.m. ET

Diversifying your equity strategy with Global Equity+

SPEAKERS: Mark Schmehl, Portfolio Manager
 Dan Dupont, Portfolio Manager
 Hugo Lavallée, Portfolio Manager

3:35 p.m. – 3:50 p.m. ET

Break

Segment 5

3:50 p.m. – 4:30 p.m. ET

State of the market

SPEAKER: Jurrien Timmer, Director, Global Macro

4:30 p.m. – 4:35 p.m. ET

Closing remarks

David Bushnell, Senior Vice President, Advisor National Sales