

9:00 - 9:20	Grand Opening Welcome, Prayer and Introductions
9:20 - 9:30	Opening Remarks from the Chair Success stories from the years
9:30 - 10:10	The Investment Challenge – <i>Turtle Island Securities Commission</i> Introduction and Trade round One Throughout the two days of the Workshop, teams will compete to manage simulated portfolios. News will occur at regular intervals, allowing teams to change their portfolio holdings. At the conclusion, prizes will be awarded to the winning teams.
10:10 - 10:30	Refreshment Break
10:30	Trading round One trades due
10:40 - 11:50	Trust Basics – <i>Jeff Harris, Myers LLP</i> This session will cover basic trust concepts and Trustee duties. Investment Basics – <i>Steven Smith, CFA, Beutel Goodman</i> This session will cover basic investment concepts and principles. Per Capita Distributions – <i>Jaimie Lickers, GowlingWLG</i> Stakeholders are increasingly focused on sustainable or responsible investing strategies. This session will help demystify some of the terms and strategies used by asset owners and managers, as well as discuss various ways to incorporate ESG investing into your Trust's investment practices.
11:50 - 12:10	Investment Challenge and Results of Round One – Issue 1
12:10 - 1:00	Lunch and Trade Round Two
1:15	Round 2 trades must be submitted by 1:15
1:00 - 1:45	Trust Development and Community Engagement – <i>Jeff Harris, Myers Weinberg</i> For many First Nations, a claim settlement or IBA will represent one of its largest assets, aside from land and people, and may well hold the key to success. Settlements and IBAs are not short-term fixes, but long-term opportunities. Planning how these assets will assist the community is critical and this is where a trust can be an effective tool. This workshop will discuss <ul style="list-style-type: none"> developing your trust in a way that recognizes not only community needs, but community capacity as well.

- how the community can develop the knowledge about trusts so that the trust itself does not become a flash point for community conflict.
- different ways of preparing for change to ensure the trust can adapt to the changing needs of the community.

Investment Advanced – James Lampard, CFA Lincluden Investment Management

For delegates with knowledge and experience in investments. This session will help them build on that knowledge and introduce more advanced concepts and theory.

Update on U.S. Withholding taxes – Max Reed, SKL Tax

Max will provide an update on the now successful strategy for recovering U.S. withholding taxes paid on U.S. dividends by Indigenous organizations.

1:45 – 2:05 Investment Challenge – Results – Issue 2 and trading round three

Second edition of the Turtle Island Financial Times is announced and distributed.
Results of the 2nd trading round and team standings announced.
Turtle Island Securities Commission (TISC).

2:05 - 2:50 Economic development and Trusts – Tim Tisdale and Tony Italiano, KPMG

Many communities are examining ways of using their Trusts to support Economic Development initiatives. This session will identify key structures and protections to both enable economic development and protect the long term viability of the trust.

2:50 – 3:10 Refreshment Break

3:10 - 3:55 What Trade Wars Mean to Investors – Panel Discussion

Moderator: Andrew Mitchell, CFA Ridgewood Capital Asset Management

Panelist: James Lampard, CFA Lincluden, Sheila Norman, CFA Fiera Capital, Steven Smith, CFA Beutel Goodman

Every day the news headlines are full of trade wars and potential new tariffs. This panel will discuss the implications of trade wars on investment portfolios and global growth

3:55 - 4:10 Team meetings and Deadline for Round 3 Trades

4:30 -6:30 WELCOME RECEPTION

Location – in the registration area. Foyer of the South West Room

Join fellow delegates and presenters to reflect on the day and compare notes.