

9:00 - 9:15 **Opening Remarks from the Chair**

9:15 - 10:10 **Sustainability – What does it mean to you**
Jaime Lickers, Catherine Twinn, Andrew Hoffman, Shaun Soonias

This panel discussion will approach the meaning of sustainability from different perspectives

10:10 - 10:50 Issue 3 Release Team meetings and Deadline for Round 4 Trades

10:40 – 11:00 Refreshment Break

11:00 – 11:40 Trust Operating Expenses – *Louis Tapper, CPA CA MNP*

Every Trust has operating expenses and the types and level of expenses will vary depending on the type of trust it is. This session will identify key considerations and how to manage the expenses.

Sustainable Investing Toolbox - *Don Herman, CFA, Jarislowsky, Fraser Limited*

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.

Sustainable Spending levels - *Sheila Norman, CFA, Fiera Capital*

As a Trustee, ensuring the long-term sustainability for your trust is paramount. The most significant driver of sustainability for most trusts will be how much is withdrawn each year for spending on projects and programs. This session will address the key determinants and assist you in developing sustainable spending policies.

11:40 – 12:15 "Turtle Island Financial Times" Issue 4 Release, Announcement of results of Trade Round 3 and Team Standings & Team Meetings

12:15 - 1:15 Lunch and Team Meetings

1:15 – 1:30 Deadline for Round 4 Trades

1:30 – 2:15 Indigenous Sovereign Wealth Funds - *Shaun Soonias, Executive Director Saskatchewan First Nations Economic Development Network*

This session will address how grassroots development of ISWF's can form the basis for seven generation planning for communities.

2:15 – 3:00 Understanding Market Cycles – *Brian Holland Guardian Capital*

If you are a new trustee, the chances are good that you have never lived through a Bear market (falling prices) but at some point, it will happen...are you ready? If the stock market only went up, your job as a trustee would be easy – but as we all know that is not what happens. In this talk we will look back at both rising (Bull) and falling (Bear) markets and the kinds of stocks that perform well in these periods along with pointers on how to be prepared.

3:00 – 3:20 Refreshment Break

3:20 – 4:00 **Building Your Team and Leveraging their Expertise**

Moderator – **Andrew Mitchell**, *Ridgewood Capital Asset Management*

Panel – **Kelly Rodgers**, *Rodgers Investment Consulting*, **Jaimie Lickers**, *Gowling WLG*, **Tim Tisdale**, *KPMG*

This panel will explore the opportunities Trustees and Leadership have to leverage the expertise of their professional advisors. By drawing on diverse expertise the First Nation and Trust can create an environment and result where the whole is greater than the sum of the parts.

4:00 – 4:20 **Release of Issue 5 “Turtle Island Financial Times” and Announcement of Team Standings**

4:20 – 4:30 Closing and Door Prizes

THANK YOU TO

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for providing refreshment breaks