

9:00 - 9:20 **Grand Opening**
Welcome, Prayer and Introductions

Good Governance; What Does it Look Like and Why is it Important?

9:20 - 9:30 **Opening Remarks from the Chair**
Success stories from the years

9:30 - 10:10 **The Investment Challenge – *Turtle Island Securities Commission***
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 **The Ins and Outs of Trusts – *Carolyn Love, & Mike Love, Legacy Private Trust***
This session will cover basic trust concepts and Trustee duties.

Investment Basics – *Steven Smith, CFA, Beutel Goodman*
This session will cover basic investment concepts and principles.

Per Capita Distributions – *Jaimie Lickers, GowlingWLG*
The issue of per capita distributions is challenging for communities. Many members want to see immediate benefits from a settlement but Council's have a legal duty to protect future generations. This session will address the legal issues that must be considered as part of the decision making

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 **Investment Advanced – *Wayne Wilson, 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.

Behavioral Biases in Decision Making - *Leith Wheeler*
At times we make quick but poor choices when faced with complex issues. Learn to avoid common pitfalls in business and every day life.

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 Congratulations You're a Fiduciary! So what? - *Jaimie Lickers, Partner, GowlingWLG*

This session will briefly outline the key duties of fiduciaries, including members of Council and Trustees. More importantly, this session will explore what it means in practice to have fiduciary duties. How does this effect the decisions you make? What are your obligations to avoid conflicts of interest? How is it relevant to the question of per capita distributions and minors' payments? What do your duties mean for your obligation to preserve funds and scrutinize expenditures from the Trust?

2:50 – 3:10 Refreshment Break**3:10 - 3:55 Trust Development and Community Engagement – Case Study, *Wasauksing First Nation***

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. Follow the path that Wasauksing First Nation took with their community engagement to develop their Trust Agreement.

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

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

9:15 - 10:10 **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.

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 **The easy (and hard) way to increase net returns – *Kelly Rodgers, CFA***

The easiest way to increase net returns (after expenses) is to reduce expenses. It is also very hard to reduce expenses, especially if a pattern of overspending has been established. This session will explore strategies that can be implemented to control expenses and ensure more money is available for programs.

Demystifying Sustainable Investing- *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.

Where to look for income? - *Neeraj Jain, CFA, Fiera Capital*

This session will cover how traditional fixed income within a balanced fund may not be able to meet income needs going forward and what solutions are available.

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 **The hiring, measurement and firing of service providers – what constitutes good governance?**

Every Trust will face multiple hire / replace decisions over its lifetime. This session will provide insights and tips on how to ensure these decisions are made within a framework of good governance and stand up to scrutiny.

2:15 – 3:00 **Real Estate: Should your Trust Invest – *Brian Holland, Guardian Capital***

There are some distinct advantages in real estate investing: higher income, lower volatility, and it is a good way to diversify your portfolio. But it has some challenges as well. It can take time to get in and time to get out. In this session, we will explore the key things you need to know about this asset class and whether it is a good fit for your trust.

Case Study – Project Proposal Application & Evaluation Process – *Thunderbird Trust*

This session will take you through one Trust’s call for proposal process and the evaluation of applications.

Negative Yields – *Andrew Hoffman and Stephanie Hickmott, Leith Wheeler Investment Counsel*

Negative Yields have arrived in Europe. This session will explain what they are, how we got here, how we got here and what comes next.

3:00 – 3:20 Refreshment Break

3:20 – 4:00 Capital Markets Review and Outlook – *Robert Cruickshank, CFA, Ridgewood Capital Asset Management*

Trade wars, tariffs and the yield curve continue to make headlines. This session will review the capital markets and a range of economic factors, incorporating street consensus on the outlook going forward.

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