

3rd Annual Indigenous Trust and Investment Conference and Annual General Meeting

May 30 - June 1, 2016

Marriott Downtown Eaton Centre | Toronto, ON



CONFERENCE AGENDA

DAY 1 - MONDAY, MAY 30, 2016

9:00 Opening Prayer
Welcome
- *Chief Laforme and Elder*

9:30 FN Consultation - *Chief Leslee Whiteye*

10:15 Refreshment Break/ Visit the Trade Show and Exhibitors

10:30 Community Engagement
- *Gordon Larin and McLeod Lake Indian Band*

11:15 Break-Out Sessions:

- Trust 101 - *Susan Milne*
- Youth Engagement - *Sharon Stevenson and Tobi Mitchell*
- Managing Success - *Brian Holland*

12:00 Celebrating the Life of Tony Shirt

12:30 Lunch/ Visit the Trade Show and Exhibitors

1:30 Appreciate Inquiry: An Approach Toward Success
- *Ismo Heikkila*

2:30 Break-Out Sessions:

- Onihcikiskowapowin Business Trust - *Leith Cardinal*
- Let a Well-Constructed Investment Policy Be Your Road Map - *Andrew Hoffman*
- Investment Basics - *Steve Smith*

3:30 Refreshment Break/ Visit the Trade Show and Exhibitors

3:45 Highlighting Successful Aboriginal Women
- *Chief Leslee Whiteye, Vickie Whitehead, Vanessa Mountain and Nadine St-Louis*

4:45 NATOA Annual General Meeting



Tuesday, May 31 @5:30 pm
Cocktail Reception at Real Sports Bar

- Watch the Blue Jays vs. Yankees, and try out your swing on a golf simulator!



DAY 2 - TUESDAY, MAY 31, 2016

9:00 Board of Directors Introduction

9:15 Housing Program Fort Peck - *Jason Campbell*

10:30 Refreshment Break/ Visit the Trade Show and Exhibitors

10:45 Break-Out Sessions:

- Careers in the Aboriginal Trust and Investment Sector - Panel
- Effective Communication Strategies for Engaging Your Community - *Linda Hartford*
- OneFeather - Electronic Voting For Your Community
- Amending a First Nation Trust Agreement - *Edward A. Suderman and Gwa'sala-'Nakwaxda'xw Band Trust*

11:45 Break-Out Sessions:

- Creating Sustainable Income for your Community - *Wayne Wilson*
- Time and Patience - Key Ingredients to Financial Success - *Sheila Norman*
- Managing a Trust Budget - *Domenic Natale*
- Circle of Philanthropy - *Wanda Brascoupe Peters*

12:30 Lunch/ Visit the Trade Show and Exhibitors

1:30 Investing for Impact - *Wayne Wilson*

2:30 Break-Out Sessions:

- Measuring the Impact of Your Projects and Distribution of Funds - *TBD*
- Successful Approaches to Effective Trust Management - *Georgina Villeneuve and Jeff Frketic*
- Spending Policy - *Joseph Connolly*

3:15 Philanthropy and Charitable Status for First Nations - *Mark Blumberg and Brad Offman*

5:30 Cocktail Reception at Real Sports Bar

- Watch the Blue Jays vs. Yankees, and try out your swing on a golf simulator!

*Agenda is subject to change

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DAY 3 - WEDNESDAY, JUNE 1, 2016

9:00 Opening Comments From Board - *Mark Sevestre and Wyatt Arcand*

9:15 Private and Public Investing - Work Together to Provide Benefits to the Local Community - *Cree Nation of Quebec and Lisa Caswell*

10:15 Refreshment Break/ Visit the Trade Show and Exhibitors

11:30 Break-Out Sessions:

- Trust Update; Legal Perspective - *Jeff Harris*
- Economic Development and Investment Program (EDIP) - *Gary Kissack and Howard Morry*
- Let a Well-Constructed Investment Policy Be Your Road Map - *Andrew Hoffman*
- Roles and Responsibilities of Trustees - *Alanna Jones, Leith Cardinal and Mark Sevestre*

11:30 • Trust Advance - *Linda Hartford*

• Meeting Your Trust Objectives is Much More Than Simply Finding a Good Investment Manager!
- *Jack Jamieson and First Nation Trustee (TBD)*

12:30 Lunch/ Visit the Trade Show and Exhibitors

1:30 Mississaugas of the New Credit - Operating More Than One Trust

2:30 Environmental, Social and Governance (ESG) - *John Cook, Peter Chapman and Jason Campbell*

3:30 Conference Close

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