

Calgary TELUS Convention Centre

120 – 9th Avenue SE, South Building | Calgary, AB | T2G 0P3

General sessions: Macleod Hall BCD

THURSDAY, SEPTEMBER 7, 2023

8:15 a.m. – 9:00 a.m.

Conference registration and breakfast

9:00 a.m. – 9:05 a.m.



Welcome remarks

David Bushnell, *Senior Vice President, Advisor National Sales*

9:05 a.m. – 9:40 a.m.



A tactical approach to income investing

SPEAKERS: Adam Kramer, *Portfolio Manager*
Scott Mensi, *Portfolio Manager*

MODERATOR: Rory Poole

9:40 a.m. – 10:15 a.m.



Fixed income now

SPEAKER: Jeff Moore, *Portfolio Manager*

MODERATOR: Kathryn Black

10:15 a.m. – 10:50 a.m.



An alternative perspective

SPEAKERS: Brett Dley, *Portfolio Manager*
David Way, *Portfolio Manager*

MODERATOR: Rory Poole

10:50 a.m. – 11:05 a.m.

Break

THURSDAY, SEPTEMBER 7, 2023 *(continued)*

11:05 a.m. – 11:40 a.m.

**Thinking big with small caps**

SPEAKERS: Connor Gordon, *Portfolio Manager*
Chris Maludzinski, *Portfolio Manager*

MODERATOR: Rory Poole

11:40 a.m. – 12:15 p.m.

**Paying dividends with active management**

SPEAKER: Don Newman, *Portfolio Manager*

MODERATOR: Kathryn Black

12:15 p.m. – 1:05 p.m.

**Lunch**

1:05 p.m. – 1:40 p.m.

**Expert insights on equities and commodities**

SPEAKERS: Joe Overdevest, *Portfolio Manager*
Darren Lekkerkerker, *Portfolio Manager*

MODERATOR: Rory Poole

1:40 p.m. – 2:20 p.m.

**Global asset allocation outlook**

SPEAKERS: David Tulk, *Portfolio Manager*
Ilan Kolet, *Institutional Portfolio Manager*

MODERATOR: Rory Poole

2:20 p.m. – 2:35 p.m.

**Break**

THURSDAY, SEPTEMBER 7, 2023 *(continued)*

2:35 p.m. – 3:15 p.m.**Turning volatility into opportunity****SPEAKER:** Dan Dupont, *Portfolio Manager***MODERATOR:** Kathryn Black**3:15 p.m. – 3:20 p.m.****Closing remarks**David Bushnell, *Senior Vice President, Advisor National Sales*