

Toronto hybrid event

Wednesday, January 31, 2024

8:15 a.m. – 9:00 a.m. ET	Conference registration and breakfast (in-person attendees) Metro Toronto Convention Centre, North Building 255 Front Street West Toronto, Ontario M5V 2W6 Constitution Hall, Rooms 105–106
9:00 a.m. – 9:05 a.m. ET	Welcome remarks David Bushnell, <i>Senior Vice President, Advisor National Sales</i>
Segment 1	
9:05 a.m. – 9:45 a.m. ET	Global asset allocation outlook SPEAKERS: David Wolf, <i>Portfolio Manager</i> David Tulk, <i>Portfolio Manager</i> Ilan Kolet, <i>Institutional Portfolio Manager</i>
9:45 a.m. – 10:25 a.m. ET	Dividend investing and downside protection SPEAKER: Ramona Persaud, <i>Portfolio Manager</i>
10:25 a.m. – 10:40 a.m. ET	Break
Segment 2	
10:40 a.m. – 11:20 a.m. ET	Fixed income now SPEAKERS: Jeff Moore, <i>Portfolio Manager</i> Stacie Ware, <i>Quantitative Analyst</i>
11:20 a.m. – 12:00 p.m. ET	A CIO perspective and market outlook SPEAKER: Andrew Marchese, <i>Chief Investment Officer and Portfolio Manager</i>
12:00 p.m. – 1:00 p.m. ET	Extended break Lunch break (in-person attendees)

Wednesday, January 31, 2024 (continued)

Segment 3

1:00 p.m. – 1:40 p.m. ET

Lessons learned

SPEAKER: Will Danoff, *Portfolio Manager*

1:40 p.m. – 2:15 p.m. ET

Thinking big with small caps

SPEAKER: Connor Gordon, *Portfolio Manager*

2:15 p.m. – 2:30 p.m. ET

Break

Segment 4

2:30 p.m. – 3:30 p.m. ET

Diversifying your equity strategy with Global Equity+

SPEAKERS: Mark Schmehl, *Portfolio Manager*

Dan Dupont, *Portfolio Manager*

Hugo Lavallée, *Portfolio Manager*

3:30 p.m. – 3:45 p.m. ET

Break

Segment 5

3:45 p.m. – 4:25 p.m. ET

State of the Market

SPEAKER: Jurrien Timmer, *Director, Global Macro*

4:25 p.m. – 4:30 p.m. ET

Closing remarks

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