

FOCUS2023

SEE WHAT WE SEE

Vancouver hybrid event

CLIENT AGENDA (AGENDA IS SUBJECT TO CHANGE. As of March 16, 2023)

Thursday, May 11, 2023

Time	Agenda
8:15 a.m.–9:00 a.m. PT	Conference registration and breakfast (in-person attendees) <i>JW Marriott Parq Vancouver, Parq Grand Ballroom 39 Smithe Street Vancouver, BC</i>
9:00 a.m.–9:05 a.m. PT (12:00 p.m.–12:05 p.m. ET)	Welcome remarks David Bushnell, Senior Vice President, Advisor National Sales
Segment 1	
9:05 a.m.–9:40 a.m. PT (12:05 p.m.–12:40 p.m. ET)	CIO insights: The evolving market landscape Andrew Marchese, Chief Investment Officer and Portfolio Manager
9:40 a.m.–10:10 a.m. PT (12:40 p.m.–1:10 p.m. ET)	Dividend investing and downside protection Ramona Persaud, Portfolio Manager Moderator: Kathryn Black
10:10 a.m.–10:50 a.m. PT (1:10 p.m.–1:50 p.m. ET)	A tactical approach to income investing Adam Kramer, Portfolio Manager Scott Mensi, Institutional Portfolio Manager Moderator: Pat Bolland
10:50 a.m.–11:05 a.m. PT (1:50 p.m.–2:05 p.m. ET)	Break

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Thursday, May 11, 2023 (continued)

Time	Agenda
Segment 2	
11:05 a.m.–11:35 a.m. PT (2:05 p.m.–2:35 p.m. ET)	Taking advantage of positive change Mark Schmehl, Portfolio Manager Moderator: Pat Bolland
11:35 a.m.–12:15 p.m. PT (2:35 p.m.–3:15 p.m. ET)	Fixed income now Jeff Moore, Portfolio Manager Stacie Ware, Quantitative Analyst Moderator: Kathryn Black
12:15 p.m.–1:05 p.m. PT (3:15 p.m.–4:05 p.m. ET)	Extended break Lunch break (in-person attendees)
Segment 3	
1:05 p.m.–1:40 p.m. PT (4:05 p.m.–4:40 p.m. ET)	Turning volatility into opportunity Dan Dupont, Portfolio Manager Moderator: Pat Bolland
1:40 p.m.–2:15 p.m. PT (4:40 p.m.–5:15 p.m. ET)	Paying dividends with active management Don Newman, Portfolio Manager Moderator: Pat Bolland
2:15 p.m.–2:30 p.m. PT (5:15 p.m.–5:30 p.m. ET)	Break

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Thursday, May 11, 2023 (continued)

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Segment 4	
2:30 p.m.–3:05 p.m. PT (5:30 p.m.–6:05 p.m. ET)	Global asset allocation outlook David Wolf, Portfolio Manager David Tulk, Portfolio Manager Ilan Kolet, Institutional Portfolio Manager Moderator: Kathryn Black
3:05 p.m.–3:40 p.m. PT (6:05 p.m.–6:40 p.m. ET)	The power and potential of contrarian investing Hugo Lavallée, Portfolio Manager Moderator: Kathryn Black
3:40 p.m.–3:45 p.m. PT (6:40 p.m.–6:45 p.m. ET)	Closing remarks David Bushnell, Senior Vice President, Advisor National Sales