

INVESTING IN SUCCESS

Wednesday, April 25, 2007

8:15 am – 12:00 noon

Hilton Toronto – Room: Toronto 3
145 Richmond Street West, Toronto

In this fast paced world where we are constantly being challenged to perform, we need to be able to access skills that will allow us to adapt quickly and with ease. This half day conference is devoted to nurturing skills that will allow you to thrive in any environment as well as providing unique industry perspectives and insights.

The day will be broken into 3 separate sessions. Topics include: **Rules to win the networking game** with Tim Cork, author of *Tapping the Iceberg*; **Change management and motivation** with former CFL champion, real estate guru, and chaplain Bruce Smith; and a panel on **Paths to success** which will discuss career paths in areas such as private client, fixed income, equities, and real estate. The 4 panelists and moderator are all charterholders and seasoned executives who have not only found success in their respective areas but also will discuss/share their experiences.

The detailed agenda below provides information on the sessions and what you will gain from your attendance.

CONFERENCE AGENDA

Registration and continental breakfast: 7:45am – 8:15am

Welcome and introduction: 8:15am – 8:30am

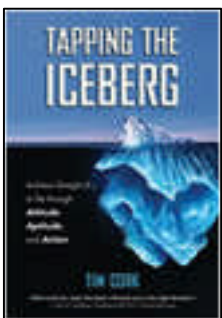
Session 1: 8:30am – 9:15am

Networking... One degree of separation

Tim Cork, President, NEXCareer, Author of "Tapping the Iceberg"

Networking ... Simply "connecting with people" is a critical element in managing your career and creating success in life. In this session you will learn:

- About networking and practicing it every day
- How to double your network
- Effective networking communication techniques
- The power of attitude and first impressions
- How to soar with the eagles
- #1 rule to networking and success in life



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Speaker Biography

Tim Cork is currently the President of NEXCareer. On March 2, 2005, Tim was featured in the *Globe & Mail* in an article titled "Rules to win the networking game." *The Globe* calls Tim "The Networking Guru" and *The Sun* calls him "The Career Guru". Tim lives in Toronto with his wife and his 2 children. He uses his name as an acronym for his purpose in life which is to Touch, Inspire and Move people.

Prior to joining NEXCareer, Tim worked as a High Performance Coach with his own company Insight Marketing where he trained and coached executives and their teams.

Tim's career spans twenty years in the hi-tech, commercial real estate and communications industries where he held progressively senior positions both nationally and internationally with companies like Xerox, Regus and TCS Telecom. He has extensive expertise in major sales initiatives, strategic alliances, people, and change issues.

Each participant will receive a copy of the book "Tapping the Iceberg"

Break: 9:15am – 9:30am

Session 2: 9:30am – 10:15am

CHANGE MANAGEMENT AND MOTIVATION

Bruce Smith, Chaplain, King Bay Chaplaincy

Speaker Biography

Bruce was raised in Huntsville, Texas and attended the University of Colorado on a football scholarship. Former Canadian Football League Grey Cup Champion and Captain of the Toronto Argonauts, Bruce was one of Canada's top real estate professionals (the #1 producer for 6 consecutive years for a national firm), as well as broker of his own company. Since 2000, he has been the Chaplain of King Bay Chaplaincy which has been featured in numerous newspaper articles as well as features on television for their work with business people, kids and the homeless. Bruce is also the senior pastor of Rock and River Congregation Church in Mississauga.

Bruce has won several awards including the Defensive Player of the Year (1979); the African Canadian Achievement Award for Athletics and Community Service (1999); the CIBC Miracle Maker Award for work with youth at risk (2003); and was also voted one of the top 125 Argos of all time (2004).

Everyone who know Bruce will agree, he is an authentically passionate and successful champion who inspires everyone on his path.

What many people don't now about are the years that preceded Bruce's celebrity in sports and business. Or, what inspires him to continually reinvent himself while giving back to the community.

Break: 10:15am – 10:30am

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Session 3: 10:30am – 11:45am

PATHS TO SUCCESS

Panel discussion

Hear your colleagues discuss their professional experiences before, during, and after the charter and the paths that led to their current positions.

This session includes a 20 minute Q&A.

Moderator

*Howard J. Atkinson, CFA, CIMA®
President, BetaPro ETFs*

Howard Atkinson has over 19 years of investment management industry experience, including positions with a national investment dealer and major mutual fund companies. Most recently Howard was responsible for business development of the Exchange Traded Products business at Barclays Global Investors Canada Limited. He currently sits as President on the Toronto CFA Society board of directors and is a member of the S&P/TSX Canada Index Advisory Panel.

Mr. Atkinson is the author of "The New Investment Frontier III: A Guide to Exchange Traded Funds for Canadians," and "Les Fonds Négociés en Bourse: Un outil de placement novateur pour l'investisseur avisé". He has been a contributing writer and frequent analyst reference in many major Canadian newspapers, including The Globe & Mail, National Post, Toronto Star, Vancouver Sun, and Ottawa Citizen. Howard has appeared on both ROBTv and Global TV, and can be seen regularly on CP24.

Panelists

*Paul Fahey, CFA - Fixed Income
Managing Partner, Aurion Capital Management*

Paul Fahey, CFA is a Managing Partner and one of the founders of Aurion Capital Management Inc., an independent Toronto-based investment counseling firm focused on institutional portfolio management. He is currently responsible for managing Real Return Fixed Income Products, including research, portfolio management and trading. He is also responsible for research supporting Aurion's strategic asset mix and currency hedging activities. Paul is also Aurion's Chief Compliance Officer and its representative for the Canadian Coalition for Good Governance.

Paul has been a board member and chaired various committees at the Toronto CFA Society. He has also served as the President's Council representative for Canadian CFA societies to the CFA Institute Board of Governors in Virginia. He has further been a volunteer participant for various CFA Institute initiatives.

Prior to founding Aurion in 1996, Paul held fixed income portfolio management positions with the Shell Canada Pension Fund, Barclays McConnell Ltd. and the Nortel Networks Pension Fund. Paul has a B. Comm. from McGill University and an MBA from Concordia University.

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*Kim Shannon, CFA, MBA - Equities
President & Chief Investment Officer, Sionna Investment Managers*

Kim founded Sionna in the summer of 2002, and has 24 years of investment management experience. She was previously Chief Investment Officer and Senior Vice President at Merrill Lynch Investment Managers, Canada, and led large capitalization equities at AMI Partners.

Kim earned her B.A. in Economics and Commerce at the University of Toronto with distinction. Kim is a past President of the Toronto Society of Financial Analysts and is currently on the CFA Institute's Financial Analysts Seminar Board of Regents, the Canadian Coalition for Good Governance's Accounting and Audit Policy Committee, as well as several charity, financial and investment committees. Kim was awarded the Morningstar Fund Manager of the Year for 2005.



*Brian Smith, CFA – Private Client
Vice-President, Private Clients, Howson Tattersall Private Asset Management*

Brian has 33 years of experience in the investment and financial services industries. As Vice-President, Private Clients at Howson Tattersall Private Asset Management, he is responsible for investment counseling, investment strategy, client relationships, and working with a portfolio management team to ensure success of client portfolios. He maintains relationships with senior wealth management practitioners including chartered accountants, tax and estate lawyers, and fee only financial planners across Canada.

Brian completed a three year term as a director of Toronto CFA Society board on August 31st, 2005, including one year as Secretary-Treasurer and member of the Executive committee. He is currently chair of the Advisory committee to board of directors of Toronto CFA Society. He is a former director of Hong Kong Canada Business Association and founding director of the Thailand Business Association of Canada. Brian is a graduate of McMaster University



*Martin Zegray, CFA, P. Eng. – Real Estate
Senior Vice-President, Realstar Management Partnership*

Mr. Zegray is responsible for revenue enhancement strategies, utility cost management as well as government relations at the federal, provincial and municipal levels. He also works with clients on new development opportunities and municipal planning issues, such as condominium conversions. Further, he manages Realstar's coin laundry business, which serves over 100 locations.

Prior to joining Realstar in 1997, Mr. Zegray was in senior positions with two pension fund asset managers and a developer. He has worked in the real estate industry since 1985, including roles in financing, development and asset management. He has managed real estate in every Canadian province and in many US markets.

He has a B.Eng. from McGill University and an MBA from the University of Western Ontario. He has served on many boards of directors, including the Federation of Rental-housing Providers of Ontario and the Greater Toronto Apartment Association.

Closing and feedback: 11:45am – 12:00noon

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Registration Fee includes: A copy of Tim Cork's book *Tapping the Iceberg*, as well as all presentation material. There will be a continental breakfast available from 7:45-8:15am along with soft drinks, coffee and tea during the two breaks.

Registration

Members: \$125 + GST
(Early bird pricing until April 18)

After April 18, 2007

Members: \$175 + GST

Eligible for 1.5 credit hours

Non-Members: \$185 + GST
(Early bird pricing until April 18)

Non-Members: \$235 + GST

Members: Please register online at www.torontocfa.ca

Non-Members: Contact eventregistration@torontocfa.ca if you do not have a user id & password

Please note that we require 48 hours cancellation notice prior to the event date otherwise you will be charged an amount equivalent to your ticket price.

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