

# CPA Canada Financial Literacy Conference “Mastering Money” Conference Agenda

\*Subject to change

DAY ONE TUESDAY, NOVEMBER 1, 2016			
7:00 – 8:30	REGISTRATION AND CONTINENTAL BREAKFAST OPEN		
7:30 – 8:30	<b>BREAKFAST SESSION (OPTIONAL)</b> <i>Getting the most out of your conference</i> Margaret Hope, Communications coach/trainer		
8:30 – 8:50	<b>WELCOME REMARKS</b> Cairine Wilson, CPA Canada; Jeff Aarssen, Great-West Life, London Life and Canada Life		
8:50 – 9:00	<b>INTRODUCTION FOR THE RT. HON. PAUL MARTIN</b> Kevin Dancey, FCPA, FCA, former President & CEO, CPA Canada		
9:00 – 10:00	<b>PLENARY SESSION</b> <i>In conversation with the Rt. Hon. Paul Martin: Martin Family Initiative</i> The Right Honourable Paul Martin, former Prime Minister of Canada; Kevin Dancey, FCPA, FCA, former President & CEO, CPA Canada		
10:00 – 10:15	REFRESHMENT BREAK		
10:15 – 11:30	<b>PLENARY SESSION (2 PARTS WITH PANEL DISCUSSION)</b> <i>Money and the biased mind</i> Dr. Ryan Decker, Ph.D., PricewaterhouseCoopers (Chicago); Dr. Alper Ozgit, Ph.D., PricewaterhouseCoopers (Chicago) <i>Canadians and Debt – the real financial mind of Canadians</i> Scott Hannah, Credit Counselling Society		
11:30 – 12:30	<b>PLENARY SESSION</b> <i>The procrastinator’s guide to retirement</i> David Trahair, CPA, CA, Financial trainer, Author, CPA Magazine columnist		
12:30 – 2:00	<b>LUNCH</b> <b>KEYNOTE ADDRESS (1:00)</b> Jane Rooney, Canada’s Financial Literacy Leader		
2:00 – 3:15	<b>CONCURRENT SESSION</b> <i>Building financial resilience for vulnerable population groups</i> Noor Din, Human Endeavour; Karen Hall, Canada Revenue Agency; Sylvie Heartfield, Employment and Social Development Canada	<b>CONCURRENT SESSION</b> <i>Building connections with your audiences – how to connect</i> Margaret Hope, Communications coach/trainer	<b>CONCURRENT SESSION</b> <i>Non-profits – understanding financial statements</i> Lisa Zamparo, CPA, CA
3:15 – 3:30	REFRESHMENT BREAK		
3:30 – 4:45	<b>CONCURRENT SESSION</b> <i>Building strong networks and partnerships</i> Christina MacIassac, Great-West Life, London Life and Canada Life; Jeremie Ryan, Financial Consumer Agency of Canada; Li Zhang, CPA Canada	<b>CONCURRENT SESSION</b> <i>How Financial Planning reduces stress</i> Kimberley Ney Financial Planning Standards, Council	<b>CONCURRENT SESSION</b> <i>Digital revolution: The role of technology in financial literacy</i> Scott Zandbergen, Intuit Canada
4:45 – 5:00	<b>DAY ONE REFLECTIONS</b>		
5:00 – 7:00	EVENING NETWORKING RECEPTION		

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DAY TWO WEDNESDAY, NOVEMBER 2, 2016	
7:00 – 8:30	<b>CONTINENTAL BREAKFAST OPEN</b>
7:30 – 8:30	<b>BREAKFAST SESSION (OPTIONAL)</b> <i>The importance of simplifying financial information</i> Carlie Weinreb, 9-year old tax whiz
8:30 – 8:45	<b>RECAP OF PREVIOUS DAY’S EVENTS AND TOPICS</b>
8:45 – 10:00	<b>PLENARY SESSION (PANEL)</b> <i>Prevent and protect against fraud and financial abuse</i> Jennifer Fiddian-Green, CPA, CA-IFA, CFF, CFI, CFE, CAMS, Grant Thornton LLP; Jessica Gunson, RCMP Canadian Anti-Fraud Centre; Kelley Keehn, Personal Finance Educator & Speaker (Moderator); John Russo, Equifax Canada Co.
10:00 – 10:15	<b>REFRESHMENT BREAK</b>
10:15 – 11:30	<b>PLENARY SESSION (PANEL)</b> <i>Reaching and engaging from the media’s perspective</i> Rob Carrick, Globe & Mail; Pat Foran, CTV Toronto; Garry Marr, Financial Post; Kelley Keehn, Personal Finance Educator & Speaker; Tamar Satov, CPA Magazine (Moderator)
11:30 – 12:00	<b>PLENARY SESSION (ROUNDTABLE DISCUSSIONS)</b>
12:00 – 12:30	<b>CLOSING REMARKS</b> Cairine Wilson, CPA Canada; Li Zhang, CPA Canada