

Canadian **Investment** Institute

September 8-10, 2025

Delta Hotels St. John's Conference Centre

St. John's, Newfoundland and Labrador

ATMS Sessions A and B: September 6-7, 2025

Investing in Canada, for Canada



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In these challenging times, investing in Canada's growth and safeguarding the funds you serve is more crucial than ever.

Attend the **Canadian Investment Institute** and learn from experts and economic professionals who will give you the tools to maximize returns for the plan dollars you oversee. If you are involved in plan investing, this program is a must-attend conference to help secure a brighter future for your plan.

Benefits of Attending

- Learn from leading-edge investment and economic professionals in Canada.
- Choose from a unique mix of investment workshops that provide enhanced opportunities for interaction with speakers.
- Hear what other funds are doing and why.

Who Should Attend

We recommend registrants have at least three years of investment education/ experience. This conference is designed for:

- Experienced labour and management trustees
- Public sector trustees
- Administrators
- Other professionals who have mastered basic investment principles.

Continue Your Trustee Training!

Advanced Trust Management Standards (ATMS™)

Session A and Session B
September 6-September 7

See page 11 for details.



SESSIONS AT A GLANCE

Breakfast and lunch will be provided.

MONDAY September 8, 2025	
8:00-9:30 a.m.	Global Investment Strategies in a Shifting Political Landscape
9:45-10:45 a.m.	A Strategic Look at Canada's Economic Future
11:00 a.m.-12:00 noon	Morning Open Forum
1:00-2:00 p.m.	Advanced Asset Allocation: Building Resilient Portfolios
2:15-3:15 p.m.	The Success Ratio of Superhuman Investors
3:30-4:30 p.m.	Partnering for Growth: Indigenous Investment Opportunities
4:30-5:30 p.m.	Welcome Reception (Guests Welcome)
TUESDAY September 9, 2025	
8:30-9:30 a.m.	Unlocking Artificial Intelligence: A New Frontier for Pension Investors
9:45-10:45 a.m.	Canada's Real Estate Outlook: What Does the Future Look Like for Real Estate Sectors?
11:00 a.m.-12:00 noon	Farmland and Renewable Resources— The Next Infrastructure?
1:00-2:00 p.m.	The Role of Energy Transition in the Battle Against Climate Change
2:15-3:15 p.m.	Private Equity Evolved: The Strategic Role of Secondaries
3:30-4:30 p.m.	Fixed Income Perspectives
WEDNESDAY September 10, 2025	
8:30-9:30 a.m.	Diversification 2.0— Adding Alternatives to Your Target Date Plans
9:45-10:45 a.m.	Evolving Exposure: Cryptocurrency's Role in Today's Portfolios
11:00 a.m.-12:00 noon	The Low Volatility Effect: Protecting in Inflationary Environments and Recessions

(All times are listed in Newfoundland Standard Time.)

PROGRAM SCHEDULE

(All times are listed in Newfoundland Standard Time.)

SUNDAY | September 7, 2025

4:00-6:00 p.m.

Registration/Information

MONDAY | September 8, 2025

7:00 a.m.-4:30 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00-9:30 a.m.

Global Investment Strategies in a Shifting Political Landscape

As Canada experiences political change, investors must assess its impact on both domestic and global markets. This session begins with a look at the global political landscape and its implications for institutional portfolios. Experts will share how different regions are managing political risk and where opportunities may lie for long-term growth amid ongoing uncertainty.

9:45-10:45 a.m.

A Strategic Look at Canada's Economic Future

With a new prime minister, shifting interest rates and volatility south of the border, Canadian pension plans face a rapidly evolving investment landscape. This session explores the key challenges and emerging opportunities that could impact your portfolio in the near term.

MONDAY | September 8, 2025 *(continued)*

11:00 a.m.-12:00 noon

Morning Open Forum

Take the conversation further with this open Q&A featuring the speakers from the two morning sessions. This is your opportunity to dive deeper into key topics and ask follow-up questions on what matters most to your funds.

12:00 noon-1:00 p.m.

Lunch *(provided)*

1:00-2:00 p.m.

Advanced Asset Allocation: Building Resilient Portfolios

Explore advanced strategies in diversification, rebalancing and liquidity management to help your plan meet its long-term goals. This session will examine how different asset classes contribute to performance as well as how to manage risk amid market swings and regulatory change.

2:15-3:15 p.m.

The Success Ratio of Superhuman Investors

A two-thirds success ratio is often seen as the hallmark of world-class investors. This session explores why achieving this is even harder than it sounds, looking at how to distinguish luck from skill and what trustees can do to tilt the odds in their favor.

3:30-4:30 p.m.

Partnering for Growth: Indigenous Investment Opportunities

This panel will explore the growing opportunities for pension plans to invest in Indigenous-led businesses—supporting economic growth while generating healthy, long-term returns. Hear from Indigenous leaders and investment professionals on how these partnerships deliver value to both communities and plan portfolios.

4:30-5:30 p.m.

Welcome Reception (Guests Welcome)

Refreshments and light hors d'oeuvres will be served.

TUESDAY | September 9, 2025

7:00 a.m.-4:30 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Unlocking Artificial Intelligence: A New Frontier for Pension Investors

AI is transforming industries, offering investors access to innovation, efficiency gains and long-term growth potential. But with rapid change comes uncertainty—valuation risk, regulatory scrutiny and ethical concerns. This session explores the opportunities and challenges of investing in AI-driven companies as well as what trustees should consider as this technology reshapes markets.

9:45-10:45 a.m.

Canada's Real Estate Outlook: What Does the Future Look Like for Real Estate Sectors?

What's next for Canada's real estate market over the next 18-24 months? This session will highlight key demographic and geographic trends, along with opportunities and risks across sectors like office, multiresidential and industrial—helping trustees better position their portfolios for the years ahead.

Register online at
www.ifebp.org/canadainvest

TUESDAY | September 9, 2025 *(continued)*

11:00 a.m.-12:00 noon

Farmland and Renewable Resources—The Next Infrastructure?

As pension funds seek long-term, stable returns, farmland and renewable resources are gaining traction as potential pillars of modern portfolios. This session explores how these real assets can offer inflation protection and sustainability while examining their place in diversified strategies—and their potential to define the next frontier in infrastructure investing for Canadian plans.

12:00 noon-1:00 p.m.

Lunch *(provided)*

1:00-2:00 p.m.

The Role of Energy Transition in the Battle Against Climate Change

The global shift toward lower carbon emissions is reshaping industries—and investment strategies. This session explores what the energy transition really means, how public energy companies and infrastructure asset managers are evolving, and where asset owners can find long-term opportunity in supporting a more sustainable economy.



Great to hear the latest in the area of investing. Trustees gain knowledge and exposure to trends and developments in the investment world.

Kyle Marryatt, CEBS

Executive Staff Officer
Nova Scotia Teachers Union

TUESDAY | September 9, 2025 *(continued)*

2:15-3:15 p.m.

Private Equity Evolved: The Strategic Role of Secondaries

Private equity secondaries offer investors a unique way to access seasoned assets with reduced risk, faster liquidity and greater portfolio stability. This session breaks down how secondaries work, why they typically outperform other private equity strategies on a risk-adjusted basis and what investors need to know—from manager selection to new structures making entry more accessible.

3:30-4:30 p.m.

Fixed Income Perspectives

In a shifting rate and inflationary environment, how should pension funds think about fixed income? This session explores evolving strategies, inflation protection and the role of fixed income in today's portfolios.

WEDNESDAY | September 10, 2025

7:00 a.m.-4:30 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast



WEDNESDAY | September 10, 2025 *(continued)*

8:30-9:30 a.m.

Diversification 2.0—Adding Alternatives to Your Target Date Plans

Canadian plan sponsors are rethinking traditional target date strategies by integrating alternatives to enhance diversification, manage downside risk and support long-term outcomes. This session explores the pros and cons of this approach, de-risking strategies and innovations that help maintain liquidity without sacrificing performance.

9:45-10:45 a.m.

Evolving Exposure: Cryptocurrency's Role in Today's Portfolios

As cryptocurrency and blockchain evolve, pension plans may face greater exposure through broader investments. This session explores how some pension plans are using cryptocurrency to hedge fiat currency and commodity volatility, how they're becoming more investable for portfolios and what trustees should consider when evaluating these opportunities.

11:00 a.m.-12:00 noon

The Low Volatility Effect:

Protecting in Inflationary Environments and Recessions

Low volatility strategies aim to reduce downside risk without sacrificing long-term returns—a potential advantage during inflation, slowdowns and recessions. This session will explain how these portfolios work, review their historical performance and help trustees evaluate whether they fit within a broader asset allocation strategy focused on stability and resilience.

Register online at
www.ifebp.org/canadainvest

Hotel Information

Delta Hotels St. John's Conference Centre

Reservation Deadline: Monday, August 4, 2025

Rates: Delta Room—
C\$249.00 Single/Double Occupancy
Signature Club Room—
C\$319.00 Single/Double Occupancy
Jacuzzi Room—C\$399.00 Single/Double
Occupancy (limited availability)
Junior Suite—C\$449.00 Single Double
Occupancy (limited availability)

Hotel Accommodations: Please visit our Hotel/Travel tab at www.ifebp.org/canadainvest to view applicable taxes and fees. You will be charged a C\$400 deposit upon registration. Please specify your hotel requirements on the registration form. For hotel questions, contact the registration department at (888) 334-3327, option 2 or edreg@ifebp.org.

Hotel Cancellation Policy: Hotel deposit forfeited for reservations cancelled within 72 hours prior to arrival.

**Note: Hotel room availability is not guaranteed outside of scheduled program dates.*

Hotel Details

The Delta Hotels St. John's Conference Centre is a modern, upscale hotel located in the heart of downtown St. John's, Newfoundland. It offers stylish accommodations with contemporary amenities, including free Wi-Fi, a fitness center and an indoor pool. Ideal for both leisure and business travelers, the hotel features a spacious conference center with state-of-the-art facilities for meetings and events. Guests can also enjoy the on-site restaurant and easy access to popular attractions like Signal Hill and the St. John's waterfront.

Location Details

St. John's, Newfoundland is the vibrant capital of Canada's Newfoundland and Labrador province. Known for its colorful row houses, rich maritime history and stunning natural landscapes, the city is one of North America's oldest settlements. Visitors can explore iconic sites like Signal Hill, where Marconi received the first transatlantic wireless signal, and the picturesque harbor. With its lively arts scene, unique culture and friendly locals, St. John's offers a mix of historical charm and modern energy, making it a popular destination for travelers.



Advanced Trust Management Standards

**Class size
is limited.
Register early.**



Session A and Session B

Saturday, September 6 | 8:00 a.m.-4:30 p.m.

Sunday, September 7 | 8:00 a.m.-4:00 p.m.

Designed for the needs of experienced trustees, Advanced Trust Management Standards (ATMS) will give you the tools you need not only to be successful in your role as a trustee, but also to look toward the future and prepare your plan for the challenges ahead.

Who Should Attend

For trustees who have either completed the FTMS® Certificate of Achievement or passed the ATMS Qualifying Test, this is the perfect opportunity to continue your trustee training.

Recommended for advanced-level appointed and elected multi-employer, public sector and corporate plan trustees/fiduciaries of any type of trust; members of pension advisory or benefit committees; and benefit office staff.

ATMS is applicable for trustees of both pension and health and welfare trust funds.



Prerequisites

Before enrolling in ATMS, you must either:

- Complete the FTMS Certificate of Achievement, earned by completing the classroom work and passing the accompanying test

OR

- Pass the ATMS Qualifying Test. Visit www.ifebp.org/atmsprereq for more information.

The ATMS program is sequential—Session A, including successful completion of the accompanying test, is a prerequisite for Session B. This will require attendance at two separate locations.

Sponsorship Opportunities



Increase your brand recognition among experienced pensions and benefits decision makers by sponsoring the Canadian Investment Institute.

Gain Optimum Brand Exposure

Sponsorships are designed to give your brand maximum exposure—before, during and after the conference—with recognition in preconference promotions, on our website, in eye-catching on-site signage and program materials, with sponsor recognition on name badges, with a six-month-long Service Provider Directory ad and more!



As a sponsor, you can network and share your knowledge with multi-employer and public sector trustees, administrators and professional advisors who are seeking resources on the investment issues impacting the funds and participants they represent.



Interested in learning more?

Contact Diane Mahler today! dianem@ifebp.org | (262) 373-7656

Canadian Investment Committee



(Chair)

Sylvie Méthot, CFA

Vice President of Business Development
Addenda Capital
Toronto, Ontario



Gary N. Chateram, M.Sc., CIMA

Senior Vice President, Head of Retail
Mackenzie Investments
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Gary K.Y. Yee, MTMS, ICD.D

Pension Coordinator
Canadian Union of Public Employees (CUPE)
Coquitlam, British Columbia

Invest in Your Workforce and Invest in Success

International Foundation flexible on-site training brings industry-leading education to your workplace. As your partner in education, we work with you to meet your unique training goals.

In-person programs, including FTMS and ATMS, bring the experts directly to you—providing a one-of-a-kind learning and team-building experience.

1

COST-EFFECTIVE

Train your entire team without the added expense of travel.

2

CONVENIENT

Maximize productivity by eliminating travel time and scheduling training when it works best for you.

3

TEAM BUILDING

Strengthen communication, motivate employees and build problem-solving skills through a shared learning experience.

4

CUSTOMIZED

We can customize content to fit your exact training needs!

LEARN MORE AT

www.ifebp.org/onsite-education or call (262) 373-7713.

REGISTRATION

Register today at www.ifebp.org/canadainvest.

CONFERENCE REGISTRATION FEES

Through July 28, 2025	Member: C\$2,050 Nonmember: C\$2,380
After July 28, 2025	Member: C\$2,350 Nonmember: C\$2,680

Save \$300 when you register before July 28!

REGISTRATION INCLUDES

Breakfast | Lunch | Beverage Breaks | Reception

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Registration fee is forfeited once program commences. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency. More information is available at www.ifebp.org/ce.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2 or email continuinged@ifebp.org.



Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit www.cebs.org/compliance for additional information.



Canadian Investment Institute

September 8-10, 2025

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Education Developed by Canadians, for Canadians 

Preconference:

ATMS Sessions A and B | September 6-7, 2025

Sessions Include

- Global Investment Strategies in a Shifting Political Landscape
- Advanced Asset Allocation: Building Resilient Portfolios
- Partnering for Growth: Indigenous Investment Opportunities
- Unlocking Artificial Intelligence: A New Frontier for Pension Investors

Register by July 28 to save C\$300!

Visit **www.ifebp.org/canadainvest** to register, or call (888) 334-3327, option 2 for more information.



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