



TERM DEPOSIT CONFERENCE 2019

Presented by CANNEX

Kingbridge Conference Centre & Hotel – September 16th, 2019

Time	Session	Speakers/Panelists
7:30 – 9:00	Breakfast	Sponsor: Portfolio+
9:00 – 9:15	Introduction & Welcome	EMCEE: Robert Cummins
9:15 – 10:00	The Financial Wealth of Canadian Households: Deposits, Investment Funds and Beyond. This session will present a comprehensive look at the evolution of the financial assets of Canadian households, paying special attention to the ebbs and flows of different product categories against a backdrop of volatile capital markets and changing investor preferences.	Speaker: Carlos Cardone, Investor Economics
10:00 – 10:45	Term Deposit Products and Rates: Drivers and Triggers. This discussion will explore what drives term deposit product offers and features, in addition to the catalysts behind setting interest rates for term deposits. Complementing insights from GIC issuers will be a view from the distribution side of the equation, exploring what resonates with advisors and their clients.	Moderator: John Garofano, HomeEquity Bank Panelists: - Andrew Johns, Canaccord Genuity - Andrew Moor, Equitable Bank
10:45 – 11:15	Break	
11:15 – 12:15	Canada Deposit Insurance Corporation - Update	Speaker: Peter Routledge, CDIC
12:15 – 1:30	Lunch	Sponsor: Canada Deposit Insurance Corporation
1:30 – 2:30	Regulation, Risk and Distribution - Panel This panel will discuss the impacts of regulation and risk mitigation on term deposit distribution. While primarily a challenge for term deposit issuers, dealers also find themselves managing the risk and concentration of their product shelf. Discussion items include: OSFI's proposed updates to Liquidity Adequacy Requirements (LAR), deposit sourcing, sources of brokered deposit funding and concentration/diversification balancing.	Moderator: John Garofano, HomeEquity Bank Panelists: - Paul Leonard, Wealth One Bank of Canada - Cristina Radu, TD Wealth
2:30 – 3:30	Sweet Dreams and Sleepless Nights from the Industry's Technology Partners – Panel This panel, consisting of key solution providers to the bank and dealer community, will discuss challenges, strengths and areas of opportunity in their businesses.	Moderator: Handika Handoko, Broadridge Panelists: - Donna Galloway, Portfolio+ - Scott Wilkinson, RPM Technologies
3:30 – 4:00	Closing Remarks & Prize Draws	EMCEE: Robert Cummins