



Fall General Meeting - October 15, 2018
 8:00 a.m. – 1:00 p.m.
 Ottawa Convention and Event Centre, 200 Coventry Road

***Financial Literacy for Retirees –
 How to better understand your finances in retirement***

- 8:00 a.m. **INFOMART** opens with refreshments
- 9:00 a.m. **Robert Giroux**, Ottawa Branch President
- Welcome for members and guests
 - Launch of Financial Literacy Program with Project Leader, Alain Corriveau, CPA
- 9:15 a.m. **Debra Foubert**, Director, Compliance and Registrant Regulation, Ontario Securities Commission (OSC)
- Best practices in choosing and working with a financial investment advisor**
- 10:10 a.m. A word from our sponsor, BMO SmartFolio re: Online investing with BMO SmartFolio
- 10:15 a.m. **BREAK** with refreshments and visit to **INFOMART**

10:45 a.m. Round 1 - Concurrent Sessions		
Room 118C – English	Room 118D – English	Room 118 E – French
Three strategies to improve after-tax investment returns	Estate planning	Bonifier ma retraite - planifier pour en retirer le maximum
Michael Fine , MBA Ottawa Branch Member	Heather Richardson Executive Trust Officer Estates & Trusts, TD Wealth	In-house expert Caisse Populaire Desjardins

11:30 a.m. **BREAK**

11:45 a.m. Round 2 - Concurrent Sessions		
Room 118C – English	Room 118D – English	Room 118 E – French
Three strategies to improve after-tax investment returns	Estate Planning	Bonifier ma retraite - planifier pour en retirer le maximum
Michael Fine , MBA Ottawa Branch Member	Heather Richardson Executive Trust Officer Estates & Trusts, TD Wealth	In-house expert Caisse Populaire Desjardins

12:30 p.m. Prize draws with **Alain Corriveau** and concluding remarks from **Robert Giroux**

1:00 p.m. **INFOMART** closes

Refreshments have been graciously sponsored by





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INITIAL LIST OF INFOMART EXHIBITORS

BMO SmartFolio
BMO Nesbitt Burns
Chartered Professional Accountants (CPA) Canada
Caisse Populaire Desjardins
National Bank Financial Wealth Management
Scotia Wealth Management
TD Wealth
Tradex Mutual Funds for the public service
Vanguard Investments Canada

CAA North & Eastern Ontario
City of Ottawa Fitness Classes
Council on Aging
Goodlife Corporate Wellness
Johnson Insurance MEDOC^{MD}

Beechwood Funeral, Cemetery and Cremation Services
Compassionate Ottawa

More to come

PLEASE TAKE NOTICE - This is not an endorsement

Disclaimer: Ottawa Branch provides information on issues, products and services of general interest to our membership. The Branch's purpose is not to endorse a particular position on an issue, or a product or service, as suitable for individual members, but to bring them to members' attention so that they can make up their own minds.