

# AGENDA

December 5-7, 2023



## Indigenous Financial Management Conference

Marriott Pinnacle Hotel | Vancouver, BC

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## Best Practices Sponsor



## President's Reception Sponsor



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## DAY ONE Tuesday, December 5, 2023

9:00 - AM  
4:00 PM

### Pre Conference Workshop: Project Financing

Michelle Kealey and Kaytlyn Barber AFOA Canada

*This 1-day workshop is designed to help build a foundational understanding of project financing and delivery principles for major infrastructure projects.*

## DAY TWO Wednesday, December 6, 2023

8:00 AM

### Conference Registration Full Breakfast Exhibitor Displays

8:45 AM

### Introduction & Traditional Welcome

Opening Comments, Barbara Joe, President, AFOA BC

Traditional Welcome by Elder Bob Baker, Squamish Nation

9:00 AM

### Keynote: Public Speaking for the Workplace

Fiona Forbes, Producer and Contributor for 'The Morning Show' on Global TV and Media Consultant for Coldwater Communications

*Fiona will be speaking about public speaking for the workplace and provide excellent real life tips on how to have confidence while presenting in public.*

10:00 AM

### Refreshment Break and Exhibitor Introductions

10:30 AM

### Data Breach: Live! Hacking Techniques & How Cyber Insurance can provide the Last Line of Defense

Derek May, Vice President, Technology & Cyber, HUB International

*During the presentation, Derek will review some common hacking techniques, including a credential harvest and ransomware attack. In addition, Derek will review best practices around Cyber Risk management, Cyber Claim Statistics, typical Cyber Coverages, and much more!*

11:15 AM

### Panel Presentation: Mastering Pension Plan Management: Strategies, Challenges, and Solutions

Panelists: Iain Johnson, Supervisor, Insurance and Pensions, Supervision, Surveillance Risk Assessment and Intervention Hub, Office of The Superintendent of Financial Institutions | Alex Mazer, Co-Founder, Common Wealth | Steven Khanna, Senior Customer Service Representative/Educator, Prizm Financial Inc.

*Buffy Mills, Indigenous Employee Benefits Consultant, Employee Owner at Acera Insurance will moderate this panel that discusses commercial policy perspective as it relates to pension and benefits and Morly Bishop, Senior Client Executive, Partner at Acera Insurance will wrap the presentation up with additional insights.*

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12:15 PM	<b>19th Annual Best Practices Awards Luncheon</b> Presented by BMO
1:15 PM	<b>5 Stages of Financial Wellness for First Nations and Indigenous Communities</b> Gord Holley, President & CEO, Humanity Financial <i>After working with many First Nations and Indigenous communities, we have developed a theory. Our theory is that there are five distinct stages of financial wellness for First Nations and Indigenous communities. Each stage has a focus and projects that should be completed. Come to this session to learn what stage you are in now, consider which stage you would like to be at and learn about what you need to do in order to get there.</i>
2:15 PM	<b>Refreshment Break and Exhibitor Displays</b>
2:30 PM	<b>Empowering through Financial Governance</b> Zain Nayani, Founder & CEO, ZN Advisory <i>We will aim to explore how a community vision can be attained in a transparent way through the cycles of planning, budgeting, implementing, and reporting. The goal would be to learn best practices to design such systems, empower people to maintain it and lead with impact to create accountability at all levels of the community.</i>
3:30 PM	<b>Notorious Cree</b> <i>James Jones will provide a traditional dance to end the day in a good way!</i>
4:15 PM	<b>AFOA BC Annual General Meeting</b>
Adjournment - 6:00 PM	<b>President's Reception - Ballroom Foyer</b> Presented by CPABC

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## DAY THREE Thursday, December 7, 2023

8:00 AM	<b>Conference Registration</b> <b>Full Breakfast</b> <b>Exhibitor Displays</b>
8:45 AM	<b>Opening Comments</b> Carol Reimer, Vice-President, AFOA BC
9:00 AM	<b>Setting the Structure for Good Decision-Making</b> Naomi Denning, Principal, Lead Investment Consultant, Eckler <i>We will discuss the importance of good governance when it comes to making investment decisions and share tips and best practices for successful investment outcomes.</i>
10:00 AM	<b>Refreshment Break and Exhibitor Displays</b>

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10:15 AM

## **Creating Trust and Building Trusts – A Path to Economic Reconciliation**

Sterling Nelson, Regional Vice-President, Indigenous Wealth | Christ Hunt, Director Senior Commercial Market and Malte Juergensen, Senior Relationship Manager at RBC

*You worked hard to bring justice to your community. Financial resources from a settlement can enable your community to create a new way forward. We are going to share with you what you need to consider when managing pre-capita distribution, and how establishing a trust is one way to ensure the future for the next seven generations.*

11:15 AM

## **Business Valuations, Negotiation and Price**

Chad Rutquist, Partner, Valuations and Litigation Support, Crowe MacKay

*A discussion on how business valuations are prepared, factors to consider when purchasing a business, and ensuring the price paid is the fair market value of what is received.*

12:15 PM

## **Lunch and Exhibitor Displays**

1:15 PM

## **Whistleblower Systems: The Value and the Challenges**

Caroline Dixon, Partner, Forensics, Grant Thornton LLP

*Whistleblowers are the single most effective source of information in detecting financial fraud. However, the biggest barrier to whistleblowing is the long history of retaliation. For insiders, the risk of being victimized as a result of disclosing wrongdoing by top executives of the companies or leaders of the communities could be substantial. Oftentimes, encouraging them to step forward requires a carefully designed system as the safety net.*

2:15 PM

## **Closing remarks, AFOA BC Draw Prizes**

3:15 PM

## **Conference Adjournment**





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