

AFOA BC
Indigenous Financial Management Conference
Dec 3-5, 2024
Marriott Pinnacle Hotel | Vancouver, BC

Pre-Conference Workshop

Cybersecurity Essentials:

Safeguarding Finance and Managing Risk for First Nations Organizations

Sponsored and Facilitated by HUB International

Tuesday, December 3, 2024
9am-4pm

Speakers:

Raymond Monteith, Senior Vice President, Risk Services Leader

Jack Bottomley, Senior Risk Consultant, ESRM Cybersecurity Risk Management Specialist

Brian Schene, Assistant Vice President, Senior Risk Services Consultant

Derek May, Vice President, Technology & Cyber

Billy-Joe Checko, Commercial Account Executive

Barbra Janzen, Commercial Account Executive

In today's digital landscape, safeguarding financial systems is essential for First Nations organizations. As cyber threats continue to evolve, it's crucial to protect your organization's financial assets and manage associated risks effectively. This workshop will provide expert insights into the latest cybersecurity practices, empowering you to fortify your organization's defenses. Join HUB's risk management experts for an interactive session designed to strengthen your organization's defenses and ensure the integrity of your financial systems. Through real-world threat briefings, mitigation strategies, and hands-on simulations, you'll leave equipped with practical knowledge to safeguard your business.

Conference Day 1 Wednesday, December 4, 2024

8:00 am Registration/Full Breakfast/Exhibits

8:45 am Opening Comments: Wendy Ham, Executive Director, AFOA BC
Traditional Welcome:

9:00 am Mapping the Path to Financial Wellness: how to measure your organization's financial health
Gord Holley, President and CEO, Humanity Financial
In this session, you'll learn how to accurately measure your organization's financial health. Discover practical tools to assess your current standing and gain insights into how to strategically advance toward long-term financial wellness.

10:00 am Refreshment Break & Exhibitor Intros

10:15 am Where's the Money Coming From?
Zain Nayani, Founder, ZN Advisory and Joel Neustater, Vice President, Indigenous Banking, BMO
How to fund projects that don't have committed funding yet. Join us for a practical talk on how to get your community projects funded and moving forward in the absence of a committed funder. We'll cover creative ways to secure project financing, make the most of local resources, and avoid the common pitfalls that cause delays to projects that are often critical for community resilience.

11:15 am AFOA Canada Update
Terry Goodtrack, President and Chief Executive Officer, AFOA Canada

12:00 pm Lunch and Networking

1:00 pm Pathways: Indigenous Journeys in the CPA Profession
CPABC Panel
The panelists will share their experiences in accounting, from the initial inspiration and expectations to the challenges and achievements along the way. This conversation will highlight the significance of Indigenous representation in finance, the value of CPA and CAFM credentials, and the transformative impact these professionals bring to their communities.

2:00 pm Refreshment Break

2:15 pm Claiming your Cash: Refunds and Exemptions for First Nations Organizations
Giuliana Ambrosini, Senior Manager, Doane Grant Thornton LLP
Sales tax can be complex, especially when it comes to First Nations organizations. It's crucial to understand how various taxes, like the GST, PST, fuel taxes and others, and related exemptions apply. Mistakes can be time-consuming, intricate, and expensive to resolve. You'll get practical tips on filing claims, organizing the right paperwork, and making sure you don't miss out on opportunities to optimize cash flow through rebates and refunds in various situations.

3:15 pm Indigenous Land Use Strategies for Profit & Economic Reconciliation
Patrick Giesbrecht, Principal Consultant, Giesbrecht & Company
Patrick will discuss case studies in 1) Benefits of involving First Nations in off-reserve land development projects & 2) Addition to Reserve process - Using Joint Ventures to create wealth.

4:15 pm Conference Adjournment

4:15 pm - 6:15 pm AGM & President's Reception

Conference Day 2 Thursday, December 5, 2024

8:00 am Registration/Full Breakfast/Exhibits

8:50 am Opening Comments: Wendy Ham, Executive Director, AFOA BC

9:00am Indigenous HR Consultant and Cultural Facilitator
Carrie Lamb, Founder, Gratefully Said Coaching
This session delves into the principles of creating culturally safe and inclusive workplaces, drawing on Indigenous knowledge to foster a supportive environment where every individual feels valued. Attendees will gain insights into integrating practices that honour diverse perspectives and empower collective growth.

10:00am Refreshments & Exhibitor Draws

10:15am Considerations for Joint Ventures and Major Development Projects
Josh Hoffman, Sr Relationship Manager, Indigenous Markets & Chris Hunt, Director, Indigenous Markets at RBC and Clark Wilson LLP

11:15 am Integrating Sustainability & Finance: Current Practice & Opportunities
Bernardo A. Arreaga, Managing Director, Corporate Finance and Stephen Uwazota, Director, Sustainable Banking & Clean Energy, BMO
This presentation explores the evolving intersection of finance and sustainability. Key topics include major sustainability drivers, the role of finance leaders in advancing sustainable practices, and emerging opportunities for integrating these two domains. We will also focus on sustainable finance products, addressing their purpose, impact, and implementation strategies, followed by an open Q&A session.

12:15 pm Festive Holiday Lunch and Awards Ceremony
Best Practices Award
Sponsored by BMO
Band Administrator Award
Sponsored by MNP

1:15 pm A Comp-versation...setting pay right!
Reena Paul and Anand Parsan, Eckler
Organizations today understand the importance of their workforce – it's their greatest asset and investment, so what does it take to ensure you attract, retain, motivate and reward top talent? Eckler will unpack and discuss, the key components towards laying the foundation for an effective compensation program and present recent case studies where we've supported other indigenous organizations to address their compensation needs, and leverage results from our recent market study to help you navigate external influences.

2:15 pm Digital Transformation and Beyond
Emily Chee, Director, Risk and Forensic Services Technology & Digital Consulting and Arian Soheili, Managing Director
Cantatus Systems Group, Inc.
This presentation will explore practical strategies, success stories, and ethical considerations for leveraging AI to enhance efficiency in financial processes, with a focus on the specific needs in Indigenous communities.

3:15pm Closing remarks, AFOA BC Draw Prizes, Conference Adjournment
