

# AGENDA

December 3-5, 2024



# Indigenous Financial Management Conference

Marriott Pinnacle Hotel | Vancouver, BC

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## Best Practices Awards sponsored by



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## DAY ONE Tuesday, December 3, 2024

9:00 - AM

### Pre-Conference Workshop

4:00 PM

Cybersecurity Essentials: Safeguarding Finance and Managing Risk for First Nations Organizations

**Sponsored and Facilitated by HUB International**

## DAY TWO Wednesday, December 4, 2024

8:00 AM

### Conference Registration

#### Full Breakfast

#### Exhibitor Displays

8:45 AM

### Introduction & Traditional Welcome

Opening Comments, Wendy Ham, Executive Director, AFOA BC

Traditional Welcome by Elder Bob Baker, Squamish Nation

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 and Exhibitor Introductions

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 Exhibitor Introductions

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- 1:00 PM**                    **Pathways: Indigenous Journeys in the CPA Profession**  
Danielle Levine, Director of Indigenous Engagement and Financial Literacy and Jan Sampson, Strategy and Governance Officer  
Will present a brief update on some of the work CPABC is doing with Indigenous communities and members.  
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.
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- 2:00 PM**                    **Refreshment Break and Exhibitor Displays**
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- 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.
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- 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.
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- 4:15 PM**                    **AFOA BC Annual General Meeting**
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- Adjournment -**            **President's Reception - Ballroom Foyer**  
**6:00 PM**                    Presented by HUB International

## DAY THREE    Thursday, December 5, 2024

- 8:00 AM**                    **Conference Registration**  
**Full Breakfast**  
**Exhibitor Displays**
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- 8:45 AM**                    **Opening Comments**  
Barbara Joe, President, AFOA BC
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- 9:00 AM**                    **Cultivating Inclusive and Safe Spaces for All**  
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.

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- 10:00 AM Refreshment Break and Exhibitor Displays**
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- 10:15 AM Considerations for Joint Ventures and Major Development Projects**  
RBC presenters: Chris Hunt & Josh Hoffman  
Clark Wilson Lawyers: Jessica Anderson, David Ford & Saul Joseph  
Explore key considerations for establishing successful joint ventures and managing major development projects in First Nation communities. This presentation will provide practical insights into balancing financial, legal, and cultural priorities to support sustainable growth and self-determination.
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- 11:15 AM Integrating Sustainability & Finance: Current Practice & Opportunities**  
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.
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- 12:15 PM Festive Holiday Lunch and Awards Ceremony**  
**Best Practices Award**  
Sponsored by BMO  
**Nation Administrator Award**  
Sponsored by MNP
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- 1:15 PM A Comp-versation...setting pay right!**  
Reena Paul, Director, Compensation Consulting and Garry Bedi, Compensation Consultant, 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.
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- 2:15 PM Digital Transformation and Beyond**  
Emily Chee, Director, Risk and Forensic Services Technology & Digital Consulting at Crowe MacKay 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.
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- 3:15 PM Closing remarks, AFOA BC Draw Prizes, Adjournment**
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# 2024 Financial Management Conference Sponsors

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