

WEDNESDAY, JANUARY 28, 2026

8:15 a.m.	<b>Conference registration and breakfast (in-person attendees)</b> Advisors must first register and scan their QR code before attending breakfast. Registration table is in the pre-function area of the John W. H. Bassett Theatre.
9:00 a.m.	<b>Welcome remarks</b>
<b>SEGMENT 1</b>	
9:05 a.m.	<b>Global Playbook 2026: Strategies for changing markets</b> David Wolf, <i>Portfolio Manager</i> David Tulk, <i>Portfolio Manager</i> Ilan Kolet, <i>Institutional Portfolio Manager</i>
9:40 a.m.	<b>Income in action: Turning yield into opportunity</b> Adam Kramer, <i>Portfolio Manager</i> Scott Mensi, <i>Institutional Portfolio Manager</i>
10:10 a.m.	<b>BREAK</b>
<b>SEGMENT 2</b>	
10:30 a.m.	<b>Innovation shaping advisor portfolios</b> Étienne Joncas-Bouchard, <i>Director, ETF and Alternatives Strategy</i> Brendan Sims, <i>Alternative Strategist</i>
11:00 a.m.	<b>Undiscovered edge: Small/mid-caps on the rise</b> Jed Weiss, <i>Portfolio Manager</i> Shilpa Mehra, <i>Portfolio Manager</i>
11:30 a.m.	<b>Sectors, factors and markets in 2026</b> Denise Chisholm, <i>Director of Quantitative Market Strategy</i>
12:00 p.m.	<b>EXTENDED BREAK</b> <b>LUNCH (IN-PERSON ATTENDEES)</b>
<b>SEGMENT 3</b>	
1:00 p.m.	<b>Markets in motion: A CIO outlook for 2026</b> Andrew Marchese, <i>Chief Investment Officer, Portfolio Manager</i>
1:40 p.m.	<b>Finding opportunities across Canada and the U.S. in 2026</b> Darren Lekkerkerker, <i>Portfolio Manager</i>
2:10 p.m.	<b>BREAK</b>
<b>SEGMENT 4</b>	
2:30 p.m.	<b>Innovation and the next era of investing</b> Neil Constable, <i>Head of Quantitative Research and Investments</i>
3:00 p.m.	<b>Value investing today: Discipline through disruption</b> Dan Dupont, <i>Portfolio Manager</i>
3:30 p.m.	<b>Growth horizon: Capturing tomorrow's innovation</b> Mark Schmehl, <i>Portfolio Manager</i>
4:00 p.m.	<b>Closing remarks</b>

Metro Toronto Convention  
Centre, North Building  
255 Front Street West  
Toronto, Ontario M5V 2W6  
General Sessions  
John W. H. Bassett Theatre