



leadership beyond finance

ANNUAL CONFERENCE
NIAGARA FALLS JUNE 4-6
2014
Scotiabank Convention Centre

Preliminary Program



MARRIOTT GATEWAY ON THE FALLS HOTEL NIAGARA FALLS, ONTARIO

A wide-angle photograph of the Niagara Falls, Ontario, showing the water cascading over the edge of the cliff. The sky is a pale, hazy blue, and the surrounding forest is dark green. The water is white and frothy as it falls.

NIAGARA FALLS, ONTARIO

Naturally

A scenic view of the Niagara Falls skyline at dusk or dawn, with a vibrant rainbow arching over the city. The buildings are silhouetted against the colorful sky, and the water of the falls is visible in the foreground.

inspired

Niagara Falls will take your breath away, and it's not just because of the magnificent view. A four-season destination rich with culture, history, recreation, entertainment, world-class cuisine and natural wonders, Niagara Falls is a naturally inspired destination. Come and experience it for yourself!

Welcome to Niagara Falls, Ontario

On most people's "bucket list" as an ideal destination for doing business and having fun, what better way to energize yourself than by taking inspiration from the incredible power of the falls? Be inspired! Inspiration can be found in a moment of time, a stroke of a brush, a pluck of a string, a turn of a phrase. From the sheer spectacle of Niagara Falls to the region's renowned wine country, from its rich history to its beautiful parks and hiking and biking trails, Niagara overflows with things to see and do. We invite you to visit, spend a few extra days to explore and delight in the discoveries that await you around the corner. With over 80 outstanding wineries, the world class performances at the Shaw Festival and so much more, it all awaits you.

**COME EARLY, STAY LATER AND ENJOY ALL THAT
NIAGARA FALLS HAS TO OFFER!**

FEI Canada's 2014 conference is a must-attend event for all our members and their guests!

FEI Canada's annual national conference and exhibit forum provides a showcase for the best and brightest in our country to come together to network, exchange ideas, learn and find solutions to current challenges. It will also equip you with tools for success and the resources you need to keep pace in these demanding times. Just look at what the FEI Canada conference has to offer:

- Six captivating keynote presentations – featuring **Dan Fortin**, President, IBM Canada, **Glenn Kerrick**, President & CEO, Alma CG, **JP Lacroix**, President, Shikatani Lacroix, **Brian Lawson**, CFO Brookfield Asset Management, **Jim Leech**, Retired President & CEO, Ontario Teachers' Pension Plan; Chancellor-designate, Queen's University, **Bill Morneau**, Executive Chairman, Morneau Shepell, **Maureen Sabia**, Chairman of the Board, Canadian Tire Corporation and many more
- Eight concurrent sessions presented by prominent Canadian executives and thought leaders such as CIBC Deputy Chief Economist **Benjamin Tal** and **Vince Molinaro**, author of "The Leadership Contract".
- Five breakfast seminars presented by Ceridian, IBM and others.
- Opportunities to connect with hundreds of senior financial executives.
- An exhibit forum offering the most current, solution oriented services.
- Golf at the magnificent Legends on the Niagara on June 4.
- An evening "experience" at Peller Estates Winery that will awaken your senses and stir your soul.

NATIONAL STRATEGIC PARTNERS





Program agenda

Tuesday

TUESDAY, JUNE 3

11:00 am – 8:00 pm

Registration/information desk open

5:00 pm – 5:30 pm

Annual general meeting – all members invited!

6:00 pm – 8:00 pm

Reception – early arrivals & guests

Wednesday

WEDNESDAY, JUNE 4

7:00 am – 3:30 pm

LEGENDARY GOLF: Legends on the Niagara – Battlefield Course

SPONSORED BY:  Robert Half®

7:30 am – 9:00 am

Breakfast – early arrivals & guests

8:00 am – 8:00 pm

Registration/information desk open

9:30 am – 4:30 pm

GUEST PROGRAM: Strewn Estate Winery tour and lunch followed by shopping in Niagara-on-the-Lake

5:00 pm – 6:00 pm

NEW MEMBERS RECEPTION

6:00 pm – 8:00 pm

WELCOME RECEPTION IN EXHIBIT HALL – all FEI Canada members & guests

SPONSORED BY:  **CPA** CHARTERED PROFESSIONAL ACCOUNTANTS ONTARIO

Thursday

THURSDAY, JUNE 5

7:00 am – 5:00 pm

Registration/information desk open

7:30 am – 8:40 am

BREAKFAST SEMINARS

- BMO Financial Group
- Ceridian Canada
- IBM Canada

8:45 am – 9:10 am

WELCOME AND OPENING REMARKS

- **Michael Conway** FEI Canada President & CEO
- **Bob Rollwagen** 2014 Conference Chair

9:10 am – 10:00 am

KEYNOTE: BRANDING THE CFO

- **Brian Lawson** CFO, Brookfield Asset Management & Canada's 2013 CFO of the Year™
- **JP Lacroix** President, Shikatani Lacroix

Thursday

10:00 am – 10:45 am **KEYNOTE: BOARD EXPECTATIONS OF THE CFO**

- **Maureen Sabia, O.C., J.D.**, Chairman of the Board, Canadian Tire Corporation

10:30 am – 4:45 pm GUEST PROGRAM: Shaw Festival Theatre and lunch in Niagara-on-the-Lake

10:45 am – 11:15 am Networking & coffee in exhibit hall

11:20 am – 12:35 pm **CONCURRENT SESSIONS**

- Designing and implementing an effective strategic planning process
MODERATOR **Laurie Tugman**, Chairman, Nexterra Financial Services
PANEL **Bill Ross**, Business Executive, Vercerta
Dean McCann, CFO, Canadian Tire
Stuart Morley, Partner with The MBO Group
- Financing, from working capital to debt and equity – planning for success
MODERATOR **Tyrone Cotie**, Treasurer, clearwater Seafoods
PANEL **Jordan Frishling**, Executive Director, Debt Capital Markets, CIBC
Tim Samis, Director, CIBC Asset-Based Lending, CIBC
Tim MacDonald, Partner, Transaction Advisory Services, EY Canada
John Forester, CFO, DBG Canada
- Diversity – when talent rises to the top, everyone wins
MODERATOR **Mary Lou Maher**, Chief Diversity Partner, KPMG
PANEL **Jordan Frishling**, Chair, Ontario Teachers' Pension Plan
Carolyn Lawrence, President & CEO of Women of Influence Inc.
Alex Johnston, Catalyst Canada Executive Director
Maureen Jensen, OSC Executive Director

12:40 pm – 1:55 pm Luncheon in exhibit hall

SPONSORED BY: **MNP**_{LLP}

2:00 pm – 3:15 pm **CONCURRENT SESSIONS**

- Economic outlook for 2014 and beyond
PANEL **Benjamin Tal**, Deputy Chief Economist, CIBC World Markets Inc.
Douglas Porter, Chief Economist and Managing Director, BMO Capital Markets
Craig Alexander, Senior Vice President & Chief Economist, TD Bank Group
- Risk management – beyond the checklist – driving risk-informed decision making
PANEL **Peter Heimler**, KPMG, LLP
David McGraw, CFO, Teachers
- Crisis communication – taking control, including social media
PANEL **Professor Terry Flynn**, McMaster University, Past President, Canadian Public Relations Society
Jim Fenny, Director, Public & Government Affairs, CN
Steve Ladurantaye, News & Government Partnerships, Twitter Canada

Thursday cont'd

2:00 pm – 3:15 pm

CONCURRENT SESSIONS (cont'd)

- Managing communications, including in a crisis
 - **Professor Terry Flynn**, McMaster University, Past President, Canadian Public Relations Society

3:20 pm – 4:30 pm

KEYNOTE: INNOVATION

- **Dan Fortin** President, IBM Canada
- **Glenn Kerrick** President & CEO, Almaco

4:30 pm – 5:30 pm

DISTINGUISHED SERVICE AWARD RECEPTION

SPONSORED BY:



6:00 pm – 6:30 pm

Depart for dinner

6:30 pm – 11:00 pm

SIP, SAVOUR AND SONG – AN EVENING FOR THE SENSES! Peller Estates Winery

SPONSORED BY:



CPA
CHARTERED
PROFESSIONAL
ACCOUNTANTS
ONTARIO



Friday

FRIDAY, JUNE 6

7:00 am – 4:00 pm

Registration/information desk open

7:30 am – 8:40 am

BREAKFAST SEMINARS

- Export Development Canada
- Xerox Canada

8:45 am – 9:00 am

OPENING REMARKS

- **Bob Rollwagen** 2014 Conference Chair

9:00 am – 11:45 am

GUEST PROGRAM: Butterfly Conservatory and Journey Behind the Falls tours

9:00 am – 9:45 am

KEYNOTE: LEADERSHIP

9:45 am – 10:30 am

KEYNOTE: FUNDING OUR RETIREMENT

- **Jim Leech, B.Sc., MBA, ICD.D.** Retired President & CEO, Ontario Teachers' Pension Plan; Chancellor-designate, Queen's University
- **Bill Morneau** Executive Chairman, Morneau Shepell

10:35 am – 11:05 am

Networking break in exhibit hall

11:10 am – 12:25 pm

CONCURRENT SESSIONS

- Controllers' roundtable including performance management reporting
- The Leadership Contract
 - Keynote by **Vince Molinaro** Global Managing Director Leadership Practice, Knightsbridge Human Capital Solutions

12:30 pm – 2:15 pm

CLOSING LUNCHEON AND KEYNOTE SPEAKER

2:15 pm – 2:45 pm

DOOR PRIZES AND CLOSE OF CONFERENCE

BRANDING THE CFO
THURSDAY, JUNE 5, 2014
9:10 am – 10:00 am

Brian Lawson

CFO, Brookfield Asset
Management and Canada's
2013 CFO of the Year™

JP Lacroix

President, Shikatani Lacroix

Brian Lawson



JP Lacroix

Maureen Sabia



**BOARD
EXPECTATIONS OF
THE CFO**

THURSDAY JUNE 5, 2014
10:00 am – 10:45 am

Maureen Sabia, O.C., J.D.

Chairman of the Board,
Canadian Tire Corporation

Keynote

Dan Fortin



INNOVATION
THURSDAY JUNE 5, 2014
3:20 pm – 4:30 pm

Dan Fortin
President, IBM Canada

Glenn Kerrick
President & CEO, Almaco

Glenn Kerrick



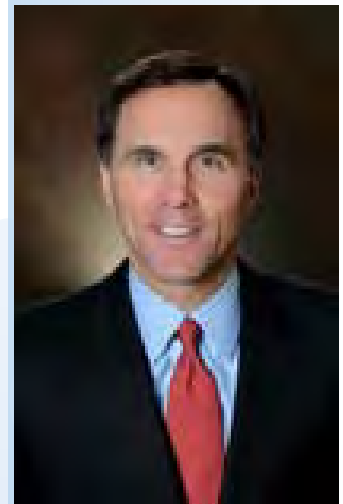
Jim Leech



FUNDING OUR RETIREMENT
FRIDAY, JUNE 6, 2014
9:45 am – 10:30 am

Jim Leech, B.Sc., MBA, ICD.D
Retired President & CEO, Ontario Teachers' Pension Plan; Chancellor-designate, Queen's University

Bill Morneau
Executive Chairman, Morneau Shepell



Bill Morneau

Speakers



Social program



Sip, Savour and Song – An Evening for the Senses!

SPONSORED BY:  **CPA** CHARTERED PROFESSIONAL ACCOUNTANTS ONTARIO  **Ryan** Innovative Solutions to Tough Problems.

Feast your eyes on the sweeping vistas of the vineyards from the majestic Peller Estates Winery in the heart of Niagara wine country. Awaken your palate with culinary delights from the kitchen of Chef Jason Parsons, perfectly paired with Peller's award winning wines. Stir your soul with the sounds of award winning jazz vocalist Juliet Dunn and her trio. Food, wine and song in perfect harmony. Pure pleasure and an evening to remember.



Golf Tournament

2014 FEI Canada conference
Golf Tournament

LEGENDS ON THE NIAGARA – BATTLEFIELD COURSE

WEDNESDAY, JUNE 4, 2014

7:00 am – 4:00 pm

SPONSORED BY:



The imposing Battlefield course is located on the north side of the Legends on the Niagara property. Golf Architect Douglas Carrick created a truly unique course that challenges every level of golfer.

The Battlefield course features a nice mix of wide, links style holes with generous undulating fairways and greens that are bound by dense forest and brush.

The bunkers on the Battlefield course are particularly treacherous, as high lips and grass walls make recoveries from errant tee shots and approach shots quite difficult. Even with the deep bunkers, Carrick has designed fairways that sweep across a gently contoured countryside that gives the golfer some breathing room both off the tee and as they approach the green.

This course features four sets of tees, stretching from 7,309 yards from the gold tees to a more manageable 5,500 yards from the red tees. This course also features a 19-acre, man-made lake, bordering the 9th and 18th holes and water features at six additional holes.





The format is “play your own ball” which allows each delegate to play at their own skill level and pace, all the while enjoying the camaraderie of their FEI Canada friends in their foursome and at lunch when the game is finished.

Price per person: \$159 + HST

Includes transportation, breakfast, green fees, cart, lunch, prizes, gifts and awards.

If needed club rentals are available for \$36 + HST.

Dress Code:

- No denim pants, shorts or shirts
- Shorts must be dress shorts and Bermuda length
- Collared shirt, turtleneck or mock neck
- Ladies may wear a sleeveless golf shirt as long as it has a collar
- No sweat pants or sweat shorts (nylon suits are acceptable)
- All players must wear non-metal spiked golf shoes or soft soled shoes

ITINERARY

Format of tournament: Play your own ball (18 holes)

- 7:30 am** Buses depart hotel for Legends on the Niagara Battlefield course
- 7:30 am** Registration and breakfast at golf course, practice range
- 9:00 am** Shotgun start (golfers should arrive at least 30 minutes prior to start)
- 2:00 pm** Buffet lunch, reception, prizes and awards
- 3:45 pm** Buses depart golf course for Marriott Gateway on the Falls hotel



Guest program



The Niagara region in the southern golden horseshoe of Ontario is one of the natural wonders of the world and with that comes a variety of activities that will enhance your experience. A must experience destination, just waiting for you!

Whether you choose from one of these Niagara region social excursions or join your colleagues on all three activities, you can be rest assured you will enjoy your stay in Niagara.

To register go to:
feicanada.org/conference2014



Wednesday

WEDNESDAY, JUNE 4, 2014

Strewn Estate Winery and shopping in Niagara-on-the-Lake

As a destination, Strewn Estate Winery is truly unique. Located just minutes from the historic Old Town of Niagara-on-the-Lake, Strewn Estate Winery is nestled in the heart of wine country. Originally home of the Niagara Canning Company, the original building was restored to a house of modern wine facility where Strewn Estate Winery has been producing award-winning VQA wine for eighteen years.

Your Strewn Estate Winery experience begins with a personalized winery tour hosted by Newman Smith, long-time FEI Canada member and Chairman of Strewn Estate Winery followed with a wine tasting. Their wines have received success both at home and internationally, as you will experience when you share a taste of their "terroir". You will enjoy a customized guided sensory tasting of a top-tier Terroir series white wine, red wine, and an award-winning icewine.

A three-course set lunch menu, including wine with main course will follow in the winery's acclaimed restaurant, Terroir La Cachette. Chef Alain Levesque combines French Provençal style of cooking with the best local ingredients, bringing together the finest the region has to offer.

Following lunch, you will have the opportunity to browse and shop along the main street of Niagara-on-the-Lake to bring a little of that "Niagara region" back home.

PRICE PER PERSON: \$90 + HST

includes transportation, tasting, lunch

ITINERARY

10:15 am	Departure from hotel
10:30 am – 4:00 pm	Winery and shopping
4:30 pm	Arrival back at hotel

Thursday

THURSDAY, JUNE 5, 2014

Shaw Festival Theatre presentation of Cabaret & Lunch

LIMITED CAPACITY – BOOK EARLY

Allow yourself to relax and enjoy a delicious lunch in Niagara-on-the-Lake followed by an enchanting afternoon at the theatre. Your journey begins with lunch at Stone Road Grille, Niagara-on-the-Lake's premier destination for gourmet, eclectic dining featuring fresh new twists on classic dishes. Stone Road Grille is defined as "the place where locals dine". House made breads, artisanal cheeses and seasonal, local fruit and produce play a vital role in complimenting the ever-changing menus. Chef du Cuisine Steve Page presides over a team of talented and passionate chefs creating memorable cuisine.

Following lunch you are off to "the theatre". Cabaret is a glittering musical! Welcome back to the Kit Kat Klub, the hottest nightclub in Berlin. American Cliff Bradshaw has just arrived in town. When he meets nightclub singer Sally Bowles and the club's mysterious emcee, his life is turned upside down, with Hitler on the rise. Hailed as a rare musical that both challenge and entertains, it premiered on Broadway in 1966 and ran for over 1,100 performance, winning numerous Tony Awards including Best Musical.



PRICE PER PERSON:

prices include transportation, lunch and theatre ticket

\$190 + HST per person – front row tickets

\$170 + HST per person – centre balcony tickets, first three rows

ITINERARY

10:30 am Departure from hotel

11:00 am – 4:15 pm Lunch and theatre

4:45 pm Arrival back at hotel

Friday

FRIDAY, JUNE 6, 2014

Butterfly Conservatory & Journey Behind the Falls

Begin the morning at the Butterfly Conservatory. This magical attraction features over 2,000 colourful tropical butterflies floating freely among lush, exotic blossoms and greenery. Paths wind through the rainforest setting, past a pond and waterfall and the Emergence window, where butterflies leave their pupae and prepare to take their first flight!

Next move onto the Journey Behind the Falls. The sound is like thunder; the sight is awe-inspiring! Take a journey deep below and behind the heart of Niagara, and stand in the mist where the mighty Horseshoe Falls tumbles from 13 storeys above! At Journey Behind the Falls you'll experience the awesome spectacle of one-fifth of the world's fresh water crashing down to the basin below.

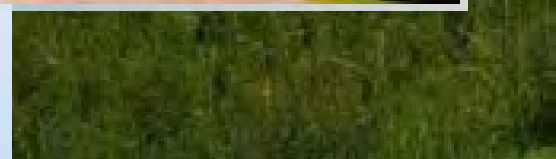
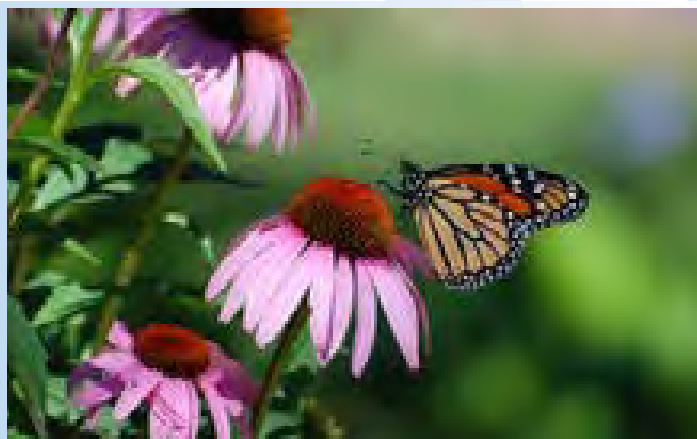
Lunch will follow these two excursions back at the Scotiabank Convention Centre for the closing luncheon and keynote speaker.

PRICE PER PERSON: \$55 + HST

includes transportation and tickets to attractions

ITINERARY

9:00 am	Departure from hotel
9:15 am – 11:45 am	Excursions
12:00 pm	Arrival back at hotel





Conference Rates*

Non-members until April 1, 2014	\$1,699
Non-members regular after April 1, 2014	\$1,849
Academic	\$699
Career services	\$699
Retired member	\$699
Guests	\$399
New members	COMPLIMENTARY **

* 13% HST will be added to all registration fees. Registration costs include all meals, access to the sessions, speakers and exhibit hall as well as a ticket to the Thursday night event and closing luncheon.

** Become a new Executive member of FEI Canada and receive a complimentary registration to attend this conference! For details call: **Sharon Bradshaw** at **(416) 366-3007 x5105** or email **sbradshaw@feicanada.org**

CANCELLATION AND REFUNDS

- Substitutions may be made at any time by emailing a written request to the attention of **Pat Todd** at **ptodd@feicanada.org**
- Cancellation requests must be received in writing by May 6, 2014.
- No refunds will be given for cancellations received after May 6, 2014.

Registration

Attendees are responsible for making their own hotel reservations. Special FEI Canada rates apply at the Marriott Gateway on the Falls, located adjacent to the Scotiabank Convention Centre. Since there are several Marriott hotels in Niagara, when booking hotel ensure you indicate the Marriott Gateway on the Falls hotel.

CONFERENCE HOTEL

Marriott Gateway on the Falls
6755 Fallsview Boulevard
Niagara Falls, Ontario L2G 3W7
Phone: 1-877-353-2557 or 1-800-618-9059

The special FEI Canada rate is in effect until May 9, 2014. Reservations received after the cut-off date (or if the group rate sells out early) will be on a space and rate availability basis. When making your reservations, please indicate that you are an attendee of the FEI Canada conference.

Room rates available from May 29 – June 10, 2014 if booked prior to May 9, 2014. *

Fallsview Room single/double occupancy	\$189
Fallsview Room triple occupancy	\$209
Fallsview Room quad occupancy	\$229

* all room rates are exclusive of applicable taxes (13% HST, 3% TIF)

TRANSPORTATION INFORMATION

A 10% discount has been arranged for conference attendees with Air Canada. Visit aircanada.com and enter promotional code "MAR9HUT1" in search panel

Conference Sponsors

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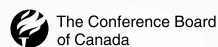
PLATINUM



GOLD



SILVER



Sponsorship opportunities available

For more information on how you can enhance your company's profile or to learn more about exhibiting, contact **Don Comish** at **(416) 366 3007 x5108** or **dcomish@feicanada.org**

Conference Exhibitors

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