



**Monday, June 5 to  
Thursday, June 8,  
2023**

2 hours per day of live  
presentations from 1:30 p.m.  
to 3:30 p.m. (ET)

## AGENDA

### Monday, June 5

1:30 to 2:00 p.m.	<b>State of the Union</b>	<b>Louis H. DeConinck</b> , President, Investia Financial Services Inc. <b>Stephan Bourbonnais</b> , Executive Vice-President, iA Wealth
2:00 to 2:30 p.m.	<b>Investia Initiative Update (Part 1)</b>	<b>Frédéric Laverdière-Pagé</b> , Vice-President, Sales and Business Development – Canada, Investia Financial Services Inc. <b>Kirk Dzaman</b> , Investment Funds Advisor, NEXTLEVEL FINANCIAL / Investia Financial Services Inc.
2:30 to 2:40 p.m.	Break	DJ MAD
2:40 to 3:30 p.m.	<b>Investia Initiative Update (Part 2)</b>	<b>Diane Borges</b> , Business Efficiency Advisor, Investia Financial Services Inc. <b>Christian Fiset</b> , Business Efficiency Advisor, Investia Financial Services Inc.

### Tuesday, June 6

1:30 to 2:25 p.m.	<b>Best Cybersecurity Practices for Entrepreneurs</b>	<b>Diane Borges</b> , Business Efficiency Advisor, Investia Financial Services Inc. <b>Nicolas Laflamme</b> , Director of Sales, Solulan <b>Christina Lockyer</b> , Assistant Chief Compliance Officer, Investia Financial Services Inc.
2:25 to 2:35 p.m.	Break	<b>Stéphane Gauthier</b> , Information Security (IS) Senior Advisor, iA Financial Group DJ MAD

2:35 to 3:30 p.m. **Launch of Cybersecurity Support Program**

**Nicolas Laflamme**, Director of Sales, [Solulan](#)

## Wednesday, June 7

1:30 to 2:25 p.m. **Privacy Best Practices**

**Julie Rochette**, Vice-President, Chief Compliance Officer and Chief Privacy Officer, iA Financial Group

**Kirk Dzaman**, Investment Funds Advisor, NEXTLEVEL FINANCIAL / Investia Financial Services Inc.

2:25 to 2:35 p.m. Break

DJ MAD

2:35 to 3:30 p.m. **Best Practices for an Efficient Business Process**

**Stéphane Blanchette**, Executive Vice-president and Chief Compliance Officer, Investia Financial Services Inc.

**Janet Himmeroder**, Manager, Branch Audits, Investia Financial Services Inc.

**Terry Cole**, Compliance Manager, Investia Financial Services Inc.

**Vanessa Johnson**, Manager, Practice Management & Training  
Investia Financial Services Inc.

## Thursday, June 8

1:30 to 2:15 p.m. **A Differentiated Approach for Complex Markets**

**Adam Dodsworth**, Vice-President, Sales, iA Clarington Investments Inc.

**Tej Rai**, Senior Vice-President, Asset Allocation, iA Global Assets Management Inc.

2:15 to 2:25 p.m. Break

DJ MAD

2:25 to 3:10 p.m. **The Economy and the Capital Markets**

**Sébastien Mc Mahon**, Vice-President, Asset Allocation and Chief Strategist, Senior Economist and Portfolio Manager, iA Global Assets Management Inc.

3:10 to 3:30 p.m. **Closing Remarks and question period**

**Louis H. DeConinck**, President,  
Investia Financial Services Inc.