

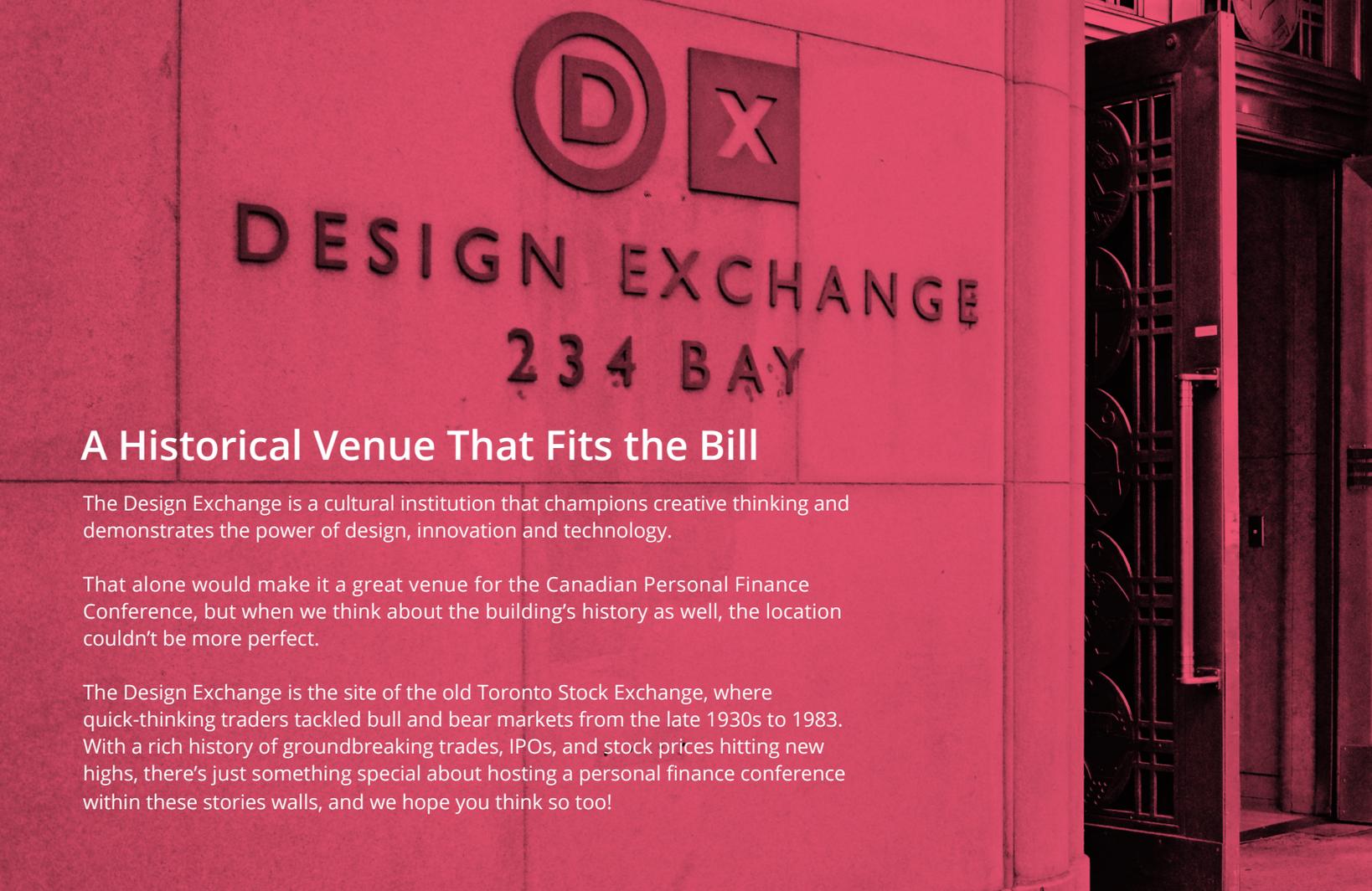


**CPFC**

CANADIAN PERSONAL  
FINANCE CONFERENCE

# Your guide to the 2018 Canadian Personal Finance Conference





## A Historical Venue That Fits the Bill

The Design Exchange is a cultural institution that champions creative thinking and demonstrates the power of design, innovation and technology.

That alone would make it a great venue for the Canadian Personal Finance Conference, but when we think about the building's history as well, the location couldn't be more perfect.

The Design Exchange is the site of the old Toronto Stock Exchange, where quick-thinking traders tackled bull and bear markets from the late 1930s to 1983. With a rich history of groundbreaking trades, IPOs, and stock prices hitting new highs, there's just something special about hosting a personal finance conference within these stories walls, and we hope you think so too!

## Welcome to the 2018 Canadian Personal Finance Conference!

### What You Can Expect

CPFC18 has been the place to be for all things personal finance for six years running, and we're keeping the momentum going with our best conference yet!

This year's conference is themed around pushing personal finance boundaries and rethinking your approach to money.

### What does that mean?

A vibrant line-up of speakers and presentations, across a wide range of financial topics relevant to you.

From the latest and greatest in trading platforms, to defining new market categories, building your brand, starting a business and balancing money with happiness, it's all here and we're thrilled for you to be a part of it.

**So enjoy, get inspired, and use the hashtag #CPFC18 to share your favourite moments and quotes on social media!**

## #CPFC18 AGENDA

### SUN. NOVEMBER 4, Pushing the Boundaries of Personal Finance

09:00am	Registration and Continental Breakfast	12:20pm	Lunch
10:00am	Opening Remarks: MC Rubina Ahmed-Haq <i>Personal Finance Journalist</i>	01:00pm	Melissa Leong <i>Money Expert for CTV and The Social</i>
10:00am	Michael Katchen — <i>CEO, Wealthsimple</i>	01:30pm	Mahima Poddar — <i>VP of Product and Corporate Development</i>
10:30am	CIBC Capital Markets: Imran Ibrahim <i>Director, Alternate Solutions Group</i>	02:00pm	Networking & Trade Show Break
11:00am	Break	02:30pm	Keynote: Bonnie Brooks — <i>Former President and CEO, Hudson's Bay</i>
11:20am	Ellen Roseman <i>Author and Personal Finance Educator</i>	03:00pm	Closing remarks
11:50am	Darlene Vilas — <i>Personal Finance Educator for an Aging Society</i>		

## #CPFC18 AGENDA

### MON. NOVEMBER 5, Your Money Re-Imagined

09:00am	Registration and Continental Breakfast	12:30pm	Lunch
10:00am	Opening Remarks: MC Rubina Ahmed-Haq <i>Personal Finance Journalist</i>	01:00pm	Lauren McPhillips <i>Founder, This Renegade Love</i>
10:00am	Cole Diamond — <i>CEO, Coinsquare</i>	01:30pm	Networking & Tradeshow break
10:30am	Capital One Canada's Fireside Chat: Patrick Ens — <i>VP of Strategy and Brand</i> & Laurie Campbell — <i>CEO, Credit Canada</i>	02:00pm	Kristen Gale — <i>CEO &amp; Founder The Ten Spot brought to you by stnce</i>
11:00am	Break	02:30pm	Dan Dickinson <i>Chief Digital Officer, EQ Bank</i>
11:30am	Alexander Stan — <i>CEO, 6IXMAN CO.</i>	03:00pm	Keynote: Devon Brooks <i>Co-Founder, Blo Blow Dry Bar</i>
12:00am	Q&A with Rob Carrick — <i>Personal Finance Columnist, The Globe and Mail</i>	04:00pm	Closing remarks



## Say Hello to This Year's Speakers

Are you ready for advice, insights and inspiration?

At CPFC18, we're thrilled to share a line-up of speakers that includes personal finance experts, award-winning entrepreneurs, experienced executives, authors, and more!

There's something to gain from every topic and background, whether you're writing about personal finance or simply focused on your future goals.

To find out more about who'll be taking the stage, get to know each speaker in the following pages!

### RUBINA AHMED-HAQ

Journalist and Personal Finance Expert

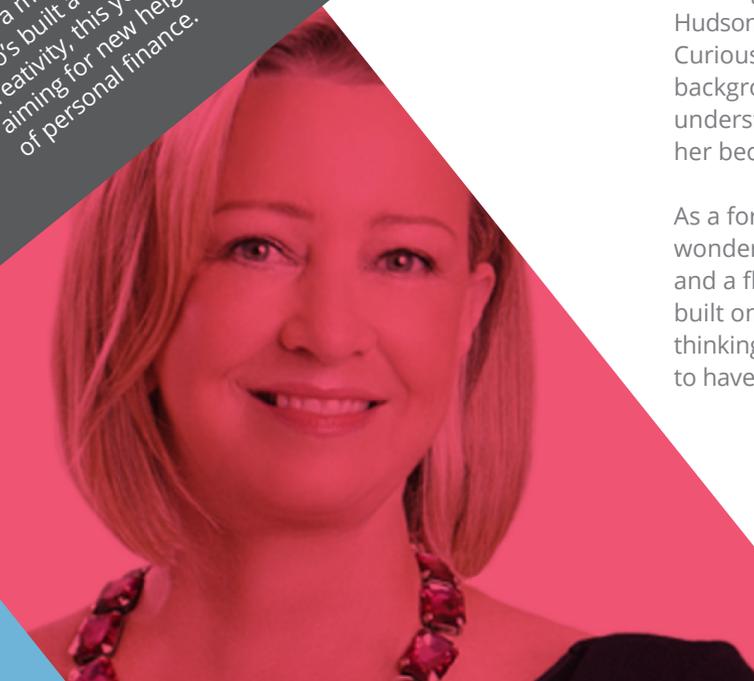
Nov 4th and 5th — Your conference MC

Rubina Ahmed-Haq combines her expertise with storytelling skills to discuss financial topics in an engaging and everyday way. She regularly appears on national TV and radio programs, including CBC Radio and Television, Global News Toronto and Global News Radio 640 Toronto.

She also writes columns for several online and print magazine publications, as well as on her own website called "Always Save Money".

### Keynote Speakers

From a market-defining entrepreneur to a pioneer who's built a career on blending commerce and creativity, this year's keynote speakers will have you aiming for new heights and pushing the boundaries of personal finance.



### BONNIE BROOKS

Former Vice Chairman and President,  
Hudson's Bay

Nov 4th, 2:30pm — Keynote Address

You might know Bonnie Brooks as the executive who put Hudson's Bay on the course to becoming a world-class retailer. Curious about how she did it? By combining her business background with a flair for the creative, Bonnie's ability to understand the needs of the Hudson's Bay customer led to her becoming the company's first female CEO.

As a former fashion stylist, writer and merchandiser, it's no wonder that her tenure led to a modernized retail strategy and a flourishing profitable whole. With a competitive edge built on bringing together the worlds of visual, innovative thinking and tried and true corporate strategies, we're thrilled to have Bonnie share her insights on her winning formula.

## DEVON BROOKS

Co-Founder, Blo Blow Dry Bar

Nov 5th, 3:00pm — Keynote Address

Devon Brooks is known for creating a market where none existed and turning it into a huge success. She is the co-founder of Blo, a second-year university project that went on to become the world's first and largest franchise chain of blow dry bars.

The company spans four countries with 52 locations, and has collaborated with international mega brands like Mattel, Guess, Topshop and Gwyneth Paltrow. PROFIT Magazine named her 1 of the 30 'Most Fabulous Entrepreneurs in Canada', and she was the youngest ever mentor to join Futurpreneur — Canada's foremost youth mentorship program — where she now sits on the advisory board. She is also an advocate supporting women against violence, and with her success defined by overcoming personal obstacles and a healthy dose of gratitude and grit, her journey is sure to inspire.



## MICHAEL KATCHEN

Co-Founder and CEO, Wealthsimple

Nov 4th, 10:00am — The Future of Investing

Michael Katchen is the co-founder and CEO of Wealthsimple, whose easy-to-use trading platform has redefined investing for a young generation, to the tune of massive success that's managed to disrupt the financial services industry.

Katchen started the company with the goal of making smart investing easy, low-cost, and accessible to everyone — regardless of age or net worth. Through his success with Wealthsimple, he was named the 2016 EY Entrepreneur of the Year.

## IMRAN IBRAHIM

Director - Alternate Solutions Group,  
CIBC Capital Markets

Nov 4th, 10:30am — Financial Services Innovations

Imran Ibrahim is a business strategy and new product development executive. He leads financial services innovation at CIBC Capital Markets – the wholesale and investment banking arm of the CIBC. With over 10 years of new product development and management experience, he now focuses on creating and leading teams to design, build, and manage a new breed of Capital Markets products.





## ELLEN ROSEMAN

Author and Personal Finance Educator

Nov 4th, 11:20am — Managing Money and Your Consumer Rights

Ellen Roseman is a popular newspaper columnist, consumer advocate, author and co-host of the MoneySaver podcast. She spent over 20 years covering consumer and personal finance issues at The Globe and Mail before joining the Toronto Star, where her weekly column appears in the Life section. She focuses on helping consumers fight back against injustices, and has authored seven books including “Fight Back: 81 Ways to Help You Save Money and Protect Yourself from Corporate Trickery” (2013).



## DARLENE VILAS

Personal Finance Educator for an Aging Society

Nov 4th, 11:50am — Your Home and Your Financial Future

Darlene Vilas is an accredited professional mortgage broker with 12 years of experience at The Mortgage Centre. She focuses on debt consolidation and credit repair, and shows homeowners different ways to use the increasing value of their home — everything from paying off debts, to helping family, doing renovations, or investing for additional income. With a particular expertise in reverse mortgages, Darlene specializes in working with seniors.

## MELISSA LEONG

Money Expert for CTV and The Social

Nov 4th, 1:00pm — How to Get Happier With Your Money

Melissa Leong is a personal finance writer, keynote speaker and on-air personality. She’s the resident money expert on Canada’s leading daytime talk show The Social, and was also a personal finance reporter for the Financial Post. Her upcoming debut book, “Happy Go Money” — which combines happiness psychology and personal finance — will focus on her quest to help individuals manage their money while maximizing their happiness.



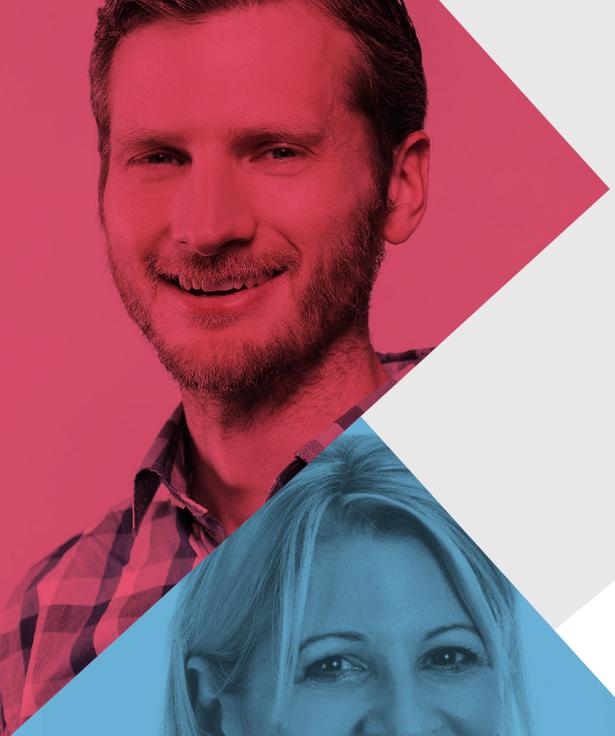
## COLE DIAMOND

CEO, Coinsquare

Nov 5th, 10:00am — The Coinsquare Ecosystem and the Future of Cryptocurrency

Cole Diamond is a Toronto native and the CEO of Coinsquare, Canada’s premier digital-currency-trading platform for Bitcoin, Ethereum and other digital currencies. Cole is a serial entrepreneur with a proven track record of scaling startups into multi-million-dollar ventures. He believes in the limitless potential of blockchain technology, and is dedicated to providing customers with better, more efficient options in their financial services.





## PATRICK ENS

VP of Strategy & Brand, Capital One Canada

Nov 5th, 10:30am — Improving Your Credit Health

Patrick Ens is passionate about designing experiences and services that will help Canadians improve their financial well-being. With 12 years of experience in the financial services industry, his number-one goal is helping customers succeed with their credit. He shares this ambition with his team at Capital One Canada, where they focus on the importance of educating and providing Canadians with the tools they need to improve their credit health.

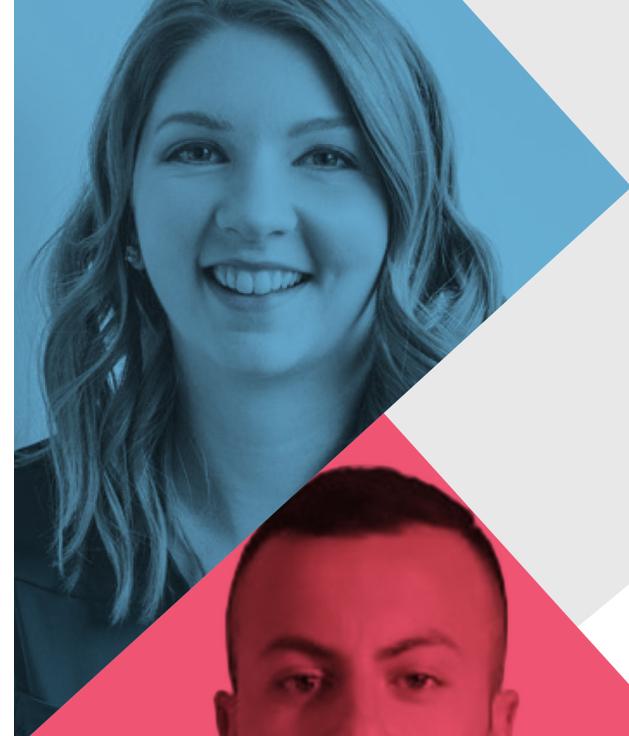


## LAURIE CAMPBELL

CEO, Credit Canada Debt Solutions

Nov 5th, 10:30am — Improving Your Credit Health

Laurie Campbell is the CEO of Credit Canada Debt Solutions — the country's first and longest-standing credit counselling agency. Under Campbell's leadership, the agency has achieved an exemplary record in championing financial literacy initiatives for all Canadians. Widely recognized as one of the nation's top experts in personal finance, she is a tireless advocate for consumer protection, and is frequently called upon by both the media and government officials to share her expertise.



## JESSICA MOORHOUSE

Money Expert, Financial Counsellor and Speaker

Nov 5th, 10:30am — Improving Your Credit Health (moderator)

Jessica Moorhouse is a millennial money expert with an Accredited Financial Counsellor Canada® certification, a speaker, an award-winning personal finance blogger, and the host of the Mo' Money Podcast. She is a regular guest on CTV's Mind the Gap, and is frequently featured in major publications including The Globe and Mail, Yahoo Finance and MarketWatch. In 2016 she founded the Millennial Money Meetup, a financial literacy event for young adults in Canada.



## ALEXANDER STAN

Co-Founder of 6IXMAN CO.

Nov 5th, 11:30am — Getting Your Business Off the Ground

Alexander Stan is an experienced sales professional and the co-founder of 6IXMAN CO., a line of natural men's grooming products. He developed the company from the ground-up with a founding team that focused on leveraging their professional backgrounds, from sales and business intelligence to social media. Like true entrepreneurs, they created products they would use themselves — products that are safe, natural, biodegradable and high-performance.

## ROB CARRICK

Personal Finance Columnist, The Globe and Mail  
Nov 5th, 12:00pm — Q&A: Personal Finance and Investing

Rob Carrick has nearly 30 years of experience writing about personal finance, business and economics. He's been a columnist with The Globe and Mail for over 20 years, where he currently writes a twice-weekly personal finance column, and a bi-weekly column on Portfolio Strategy. He's also set to start hosting a podcast called Retirementality, and is the author or co-author of five books, including his latest "How Not to Move Back in With Your Parents: The Young Person's Complete Guide to Financial Empowerment".

## LAUREN MCPHILLIPS

Founder, This Renegade Love  
Nov 5th, 1:00pm — How to Build Your Personal Brand

Lauren McPhillips is the writer and photographer behind This Renegade Love, a Toronto-based blog that encourages readers to 'live a life that is authentically you'. Since transitioning from a career in Editorial and PR to launching her blog in 2015, Lauren has built an online community that is actively engaged with her unfiltered content on everything from blogging and branding, to travel and wellness. Over the years, she's partnered with brands like Google, Indigo, and BMW, and is set to launch a series of workshops for female entrepreneurs this fall.



## KRISTEN GALE

CEO and Founder, The Ten Spot®  
Nov 5th, 2:00pm — How The Ten Spot® Came to Life and Lessons Learned (brought to you by stnce)

Kristen Gale is the CEO and founder of The Ten Spot® beauty bars, Canada's fastest growing beauty services company with locations across Canada. Starting with a single store in Toronto's then up-and-coming Queen West neighbourhood, The Ten Spot® has become one of Canada's most beloved brands. Her success has won her numerous entrepreneurial distinctions, including being on Profit 500's list of Canada's fastest growing companies for the last four years.

## DAN DICKINSON

Chief Digital Officer, Equitable Bank  
Nov 5th, 2:30pm — Getting the Most Out of Digital Banking

Dan Dickinson is the Chief Digital Officer at Equitable Bank, Canada's ninth-largest independent bank. Dan joined Equitable in 2013 as VP of Digital Banking and launched EQ Bank, a digital-only bank, in January 2016. Throughout his 20+ years of banking and software experience, he has focused on the role technology plays in serving the customer, the employee, and the bank.





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