



# 7th Annual NATOA Virtual Indigenous Trust and Investment Conference *'Moving Forward with a Community Focus'* September 28-30, 2020



**\*All times are in Mountain Standard Time**

## AGENDA

### DAY ONE – MONDAY, SEPTEMBER 28, 2020 ( Mountain Standard Time)

- 9:00 am**      **Opening Ceremony**  
NATO A Welcome, Land Acknowledgment
- 9:30 am**      **How Changes to Canadian Laws Impact Your Nation's Trust, and Tips to Navigate the Road Ahead - BMO**  
Providing the current state of Trust funds in Canada.
- 10:30 am**      **Break**
- 11:30 am**      **Breakout Sessions**
- Your Trust and Community Engagement - CIBC**  
How do you know your Trust funds are benefiting your community? A discussion on the techniques that are or could be used to ensure your funds are effectively utilized with community engagement
- Trust 101- TD Bank**  
A session designed for the newly elected Trustee, to ensure that they understand the role and responsibility that they now have for the benefit of the community.
- Investment 101- Beutel Goodman**  
This workshop focuses on explaining how a Trust Investment Portfolio is designed to achieve the investment objectives of an Indigenous Trust.
- 12:30 pm**      **LUNCH**
- 1:30 pm**      **Breakout Sessions**
- Private Placement Investment - Raven Indigenous Capital Partners**  
Public investment markets versus Privately/Directly placed investing opportunities is a developing market segment led by Indigenous owned and operated funds
- Developing and Tying your Community Comprehensive Plan to your Trust - Peace Hills Trust**  
This presentation will speak about the importance of developing a community comprehensive plan, capital plan or strategic plan and then using the income and/or capital.
- Climate Change –Implications to your Investment portfolio - Jarislowsky Fraser**  
This presentation will explore how climate risk will impact both our physical world and the global system that finances economic growth. While the path towards climate change mitigation and adaptation is uncertain, we expect that it will likely create both risks and opportunities for investors.
- 2:30 pm**      **Day Closing**

### DAY TWO – TUESDAY, SEPTEMBER 29, 2020 (Mountain Standard Time)

- 9:00 am**      **Opening Ceremony**  
NATO A Welcome, Land Acknowledgment
- 9:30 am**      **Negative Interest Rates Explained- Leith Wheeler**  
If the idea of negative interest rates confuses you, you're not alone. The concept seems to undermine our understanding of how lending is supposed to work: This session will give you a in depth look on how it effects you.
- 10:30 am**      **Break**
- 11:30 am**      **Breakout Sessions**
- Harnessing the Power of Trusts to Drive Benefits for your First Nation - Concentra Trust**  
In this workshop, you will learn to unlock the power and potential of trusts by discussing key benefits of leveraging trusts for economic benefits. Redesigning a restrictive, existing trust in order to create a source of growth investments and economic enablement for your First Nation.
- Governance Structures for Today's Fiduciaries - Russell Investments**  
With more demands being placed on fiduciaries managing investments, it is paramount to ensure that decisions are made in an informed and appropriate manner and by reference to a good governance structure. This session explores the basics of investment governance, establishing good governance structures, as well as making the most of precious investment committee time. We will explore the issues that need the most attention and have the most impact on the portfolio, as well as raise practical issues and questions to help investment committees become more efficient. This will include preparing appropriate agendas, focusing on the most material issues, getting the most out of the time spent with their investment managers & asking the right questions.
- Achieving Sovereignty Over Your Wealth - NATOA**  
What is known about the framework for Sovereign Wealth Funds internationally and how does that relate to Indigenous Trusts in Canada? Learn about the international generally accepted principles and practices for sovereign wealth funds
- 12:30 pm**      **LUNCH**
- 1:30 pm**      **Breakout Sessions**
- Investment Advanced -Letko Brosseau**  
How much return do you require? Asset allocation and How much risk can you tolerate will all be covered.
- The Hiring, Measurement and Replacement of Service Providers – TE Wealth Indigenous Advisory Services**  
Every Trust will face multiple hiring and replacement decisions surrounding service providers over its lifetime. This session will provide insights and tips on how to ensure these decisions are made within a framework of good governance and effectively stand up to scrutiny.
- 2:30 pm**      **Day Closing**

*\*Agenda is subject to change*

**9:00 am**            **Opening Ceremony**  
 NATOA Welcome, Land Acknowledgment

**9:30 am**            **Per Capita Distributions- CIBC, NATOA & Gowling WLG**  
 The issue of per capita distributions is challenging for communities. Many members want to see immediate benefits from a settlement but Councils have a legal duty to protect future generations. This session will address the legal issues that must be considered as part of the decision making.

**10:30 am**           **Break**

**11:30 am**           **Breakout Sessions**

**Aligning Investments and Indigenous Rights-SHARE & NATOA**  
 This session will explore the connections between the investment sphere and the United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP). How are investing and Indigenous rights connected? How can we champion Indigenous rights as investors?

**Social Outcomes of Impact Investing- Lincluden**  
 In this session you will learn how positive social outcomes can be achieved through your investment portfolio.

**Non-Traditional Assets- Fiera Capital**  
 The days of the 60/40 balanced portfolio may be numbered! It's true that over the long-term, this type of portfolio has done relatively well, with the 60% equities portion participating in market gains and the 40% bond portion providing income and some downside protection. However a number of factors – namely, record low interest rates and equities moving more in tandem with bonds – have made this traditional portfolio less attractive of late. Enter alternative assets: agricultural land; real estate; private debt and private equity; and infrastructure assets, just to name a few. These non-traditional asset classes have increased in importance in institutional portfolios, thanks to their ability to help diversify a portfolio

**12:30 pm**           **LUNCH**

**1:30 pm**            **Breakout Sessions**

**Building Economic Resiliency - Indigenomics Institute**  
 This session will explore building an economic response within the current pandemic environment. Indigenomics is a modern, constructive, generative, economic design. The session will include topics such as considerations when building an economic response, identifying emerging trends, phased risk management, internal and external responses, short, medium and long term responses, principles for economic response and preparing for recovery

**Trust Advance**  
 Many First Nations find that a Trust can be used as part of their overall Wealth Strategy to manage their long-term assets as a Protection of Assets, including settlement dollars.

**2:30 pm**            **Day Closing**



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