



FINANCIAL FORUM & AGM SCHEDULE

MARCH 26-27, 2024 | HOTEL GRAND PACIFIC
463 BELLEVILLE ST, VICTORIA, BC

TUESDAY, MARCH 26	
4:00 p.m. - 6:00 p.m.	Registration & Welcome Reception <i>Vancouver Island Ballroom & Foyer</i>
WEDNESDAY, MARCH 27	
7:30 a.m. - 9:00 a.m.	Registration <i>Vancouver Island Ballroom Foyer</i>
8:00 a.m. – 8:55 a.m.	Breakfast <i>Pender Island Ballroom</i>
9:00 a.m.	Financial Forum Welcome <i>Vancouver Island Ballroom</i>
9:05 a.m.	Session 1: Economic Update <i>Vancouver Island Ballroom</i>
10:00 a.m.	Session 2: Investing in a Polarizing World <i>Vancouver Island Ballroom</i>
10:45 a.m. – 11:00 a.m.	Connection Break
11:00 a.m.	Session 3: Canadian Political Landscape <i>Vancouver Island Ballroom</i>
12:00 p.m. – 1:25 p.m.	Lunch & Connection Break <i>Pender Island Ballroom</i>
1:30 p.m. – 2:30 p.m.	Annual General Meeting <i>Vancouver Island Ballroom</i>
2:30 p.m.	Brief Trustee Meeting <i>Vancouver Island Ballroom</i>
2:30 p.m.	Member Group Photo <i>South Pender Island Ballroom</i>



Session 1: Economic Update + Q&A – 9:00 a.m.

SPEAKER: Warren Lovely, Managing Director, National Bank of Canada Financial Markets

Warren Lovely is a Managing Director with National Bank Financial (NBF), serving as Chief Rates and Public Sector Strategist within the firm's Economics and Strategy group. Warren joined NBF in 2015 from CIBC, where he had worked for 15 years in a variety of roles in economics, strategy, and debt underwriting. Warren had earlier worked for the Government of Canada in Ottawa, including at the Department of Finance. Warren holds a Master's degree in Economics from Queen's University and a Bachelor of Arts in Economics from Wilfrid Laurier University. Warren is a frequent commentator on financial markets in the media and regularly speaks to investors, business groups and governments in Canada and abroad.

Session 2: Investing in a Polarizing World + Q&A – 10:00am

SPEAKER: Andrew Sweeney, Managing Director, PH&N Institutional/RBC Global Asset Management

Andrew is a portfolio manager specializing in multi-asset portfolios. He joined PH&N Institutional in 2007, having previously managed Canadian equity portfolios for a large, well-respected Canadian institutional asset manager. Since entering the investment industry in 1995, he has had analytical research responsibilities for most sectors within the Canadian equity market and, as a result, has acquired a strategic, long-term outlook on capital markets. Andrew is a member of the PH&N Management Committee and sits on the board of Chartered Professional Accountants of BC and the Investment Committee of WorkSafeBC.

Session 3: Canadian Political Landscape – A Conversation – 11:00am

SPEAKER: Keith Baldrey, Political Correspondent

Keith Baldrey is highly regarded as one of BC's best known political commentators. He currently serves as the chief political correspondent and legislative bureau chief for Global BC where he provides insightful coverage and analysis on the latest developments in BC's political landscape. In 2021, Baldrey was named Broadcast Performer of the Year by the BC Association of Broadcasters for his coverage of the COVID-19 pandemic. Baldrey's work is also seen in his weekly syndicated column on B.C. politics for a variety of Lower Mainland papers, including the North Shore News and the Now newspapers, and appears regularly on News Talk 980 CKNW. He makes public speaking appearances on B.C. politics, has written numerous magazine articles, and co-authored a book on former premier Bill Vander Zalm and his Social Credit government.

SPEAKER: Vaughn Palmer, Political Columnist

Vaughn Palmer's hard-hitting columns have seen him cover the feats and follies of B.C.'s premiers for almost 40 years. An award-winning journalist, Palmer is the Vancouver Sun's provincial political columnist, based in Victoria. Palmer is a regular commentator on radio station CKNW in Vancouver. Palmer is the recipient of the Bruce Hutchison Lifetime Achievement Award from the Jack Webster foundation, a co-winner of the Jack Webster award for reporting, and a recipient of the Hyman Solomon award for excellence in public policy journalism from the Canadian Public Policy Forum. Since 1984, Palmer has examined an extensive range of issues, personalities and scandals that have come to define B.C.'s political scene.
