

Canadian **Investment** Institute

November 9-11, 2026

Nassau, The Bahamas

Preconference: November 7-8, 2026



**REINVESTING
IN CANADA**

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International Foundation  CANADA
OF EMPLOYEE BENEFIT PLANS

Canadian Investment Institute

November 9-11, 2026

The Royal at Atlantis Paradise Island
Nassau, The Bahamas

The **Canadian Investment Institute** is designed to help you navigate the investment challenges you are facing while offering a clear Canadian perspective on how to best prepare your funds. Developed by Canadian trustees and investment leaders who understand the realities you are facing now, this program will help you make more informed decisions and help strengthen the financial position of the fund you serve.

Benefits of Attending

- Learn from leading-edge investment and economic professionals in Canada.
- Choose from a unique mix of investment sessions that provide enhanced opportunities for interaction with speakers.
- Hear what other funds are doing and why.

Who Should Attend

We recommend attendees have at least three years of investment education/experience. This conference is designed for:

- Experienced labour and management trustees
- Public sector trustees
- Administrators
- Other professionals who have mastered basic investment principles.

Continue Your Trustee Training!

Advanced Trust Management Standards (ATMS®)

Session A and Session B

November 7-8, 2026

See page 12 for details.

SESSIONS AT A GLANCE

Breakfast and lunch will be provided.

MONDAY November 9, 2026	
8:15-9:30 a.m.	How Politics Is Shaping Markets and Investment Risk
9:45-10:45 a.m.	Economic Trends and What Trustees Should Watch
11:00 a.m.-12:00 noon	Rethinking Asset Allocation in Today's Investment Environment (Canadian Lens)
1:00-2:00 p.m.	Investing in Canada: Opportunities and Risks for Pension Plans
2:15-3:15 p.m.	Farmland and Canada's Role as the World's Breadbasket
3:30-4:30 p.m.	Real Estate Investing in Canada Today
TUESDAY November 10, 2026	
8:30-9:30 a.m.	From Coffee to Copper: Why the Next Ten Years Matter for Commodities
9:45-10:45 a.m.	Infrastructure Markets: Where Pension Capital Is Going
11:00 a.m.-12:00 noon	Thinking Outside North America: Global Equity Outlook
1:00-2:00 p.m.	Which Risk Runs Deeper: Owning or Avoiding Emerging Markets?
2:15-3:15 p.m.	Currency Risk and What It Means for Pension Portfolios
3:30-4:30 p.m.	Incorporating Liability Considerations When Making Asset Mix Decisions
WEDNESDAY November 11, 2026	
8:30-9:30 a.m.	Artificial Intelligence, Energy and the New Demand for Resources
9:45-10:45 a.m.	How Target-Date Funds Are Evolving
11:00 a.m.-12:00 noon	Built to Last: Designing Liquidity Resilience in Open-Ended Private Market Funds (Not a Sales Pitch)

(All times are listed in Eastern Standard Time.)

PROGRAM SCHEDULE

(All times are listed in Eastern Standard Time.)

SUNDAY | November 8, 2026

4:00-6:00 p.m.

Registration and Information

MONDAY | November 9, 2026

7:30 a.m.-4:30 p.m.

Registration and Information

7:30-8:15 a.m.

Continental Breakfast

8:15-9:30 a.m.

How Politics Is Shaping Markets and Investment Risk

- How geopolitical tensions are affecting global markets
- Impact of U.S. policy and China relations on investment decisions
- Political risks that could influence inflation, trade and growth
- Key issues trustees should monitor over the next year

9:45-10:45 a.m.

Economic Trends and What Trustees Should Watch

- Global economic outlook for growth, inflation and interest rates
- How central bank policy may affect markets and portfolios
- Key risks that could influence economic conditions
- What the economic outlook means for pension plan investors

MONDAY | November 9, 2026 *(continued)*

11:00 a.m.-12:00 noon

Rethinking Asset Allocation in Today's Investment Environment (Canadian Lens)

- Key trends affecting portfolio construction
- How rising rates and volatility are influencing asset allocation
- Balancing growth, diversification and risk management
- Role of public markets, private markets and real assets
- Questions trustees should ask when reviewing portfolio strategy

12:00 noon-1:00 p.m.

Lunch *(provided)*

1:00-2:00 p.m.

Investing in Canada: Opportunities and Risks for Pension Plans

- Why governments and investors are emphasizing domestic investment
- Opportunities in Canadian resources, infrastructure and innovation
- Potential benefits and risks of increasing Canadian exposure
- What trustees should consider when allocating capital to Canada
- How domestic investment fits within a diversified portfolio

2:15-3:15 p.m.

Farmland and Canada's Role as the World's Breadbasket

- Canada as a global food power
- The long-term investment case for Canadian farmland
- Beyond geography: Canadian farmland is a diversified asset class
- Understanding farmland return drivers
- Natural inflation and pension plan liability hedge
- Important portfolio construction considerations
- A reliable real asset in an uncertain world

MONDAY | November 9, 2026 *(continued)*

3:30-4:30 p.m.

Real Estate Investing in Canada Today

- Current conditions in Canadian real estate markets
- Liquidity, valuation and financing challenges
- Sector trends across office, residential and industrial markets
- What the outlook means for institutional investors

4:30-5:30 p.m.

Welcome Reception *(Guests Welcome)*

Refreshments and light hors d'oeuvres will be served.

TUESDAY | November 10, 2026

7:30 a.m.-4:30 p.m.

Registration and Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

From Coffee to Copper:

Why the Next Ten Years Matter for Commodities

- Why commodity markets are entering a new investment cycle
- The role of commodities in diversification and inflation protection
- Supply constraints and long-term demand trends
- How commodities may fit into institutional portfolios

**Register online at www.ifebp.org/canadainvest
by September 25 to save C\$300!**

TUESDAY | November 10, 2026 *(continued)*

9:45-10:45 a.m.

Infrastructure Markets: Where Pension Capital Is Going

- Why infrastructure has become a core pension investment
- Key sectors attracting institutional capital
- Risk and return characteristics of infrastructure investments
- Inflation protection and long-term cash flow characteristics
- Global trends shaping infrastructure investment opportunities
- Factors trustees should consider when evaluating allocations

11:00 a.m.-12:00 noon

Thinking Outside North America: Global Equity Outlook

- Global equity opportunities beyond North America
- Regional trends shaping international markets
- Risks related to valuation, concentration and geopolitics
- How global equities can diversify pension portfolios

12:00 noon-1:00 p.m.

Lunch *(provided)*

1:00-2:00 p.m.

Which Risk Runs Deeper: Owning or Avoiding Emerging Markets?

- Current valuation differences between emerging and developed markets
- How governance and economic reforms are changing emerging markets
- Key risks investors must consider when allocating to these markets
- How emerging markets can improve diversification

2:15-3:15 p.m.

Currency Risk and What It Means for Pension Portfolios

- Why currency movements matter for global portfolios
- Approaches pension plans use to manage currency risk
- Benefits and trade-offs of currency hedging
- When currency exposure can create opportunity
- Governance considerations when setting currency policy

TUESDAY | November 10, 2026 *(continued)*

3:30-4:30 p.m.

Incorporating Liability Considerations When Making Asset Mix Decisions

- How pension liabilities influence investment strategy
- Overview of liability-driven investing approaches
- Aligning asset mix with funding and risk objectives
- Questions trustees should ask when evaluating asset liability strategy

WEDNESDAY | November 11, 2026

7:30 a.m.-12:00 noon

Registration and Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Artificial Intelligence, Energy and the New Demand for Resources

- How AI growth is increasing demand for energy and infrastructure
- The role of mining, power and data infrastructure in the AI economy
- Investment opportunities linked to AI-related resource demand
- Risks and considerations for investors

WEDNESDAY | November 11, 2026 *(continued)*

9:45-10:45 a.m.

How Target-Date Funds Are Evolving

- How target-date strategies have changed over time
- Increased use of alternatives and private assets
- Adjustments to glidepaths and portfolio design
- Considerations for pension plan investors

11:00 a.m.-12:00 noon

Built to Last: Designing Liquidity Resilience in Open-Ended Private Market Funds (Not a Sales Pitch)

- How liquidity works in open-ended private market funds
- Key risks when redemption pressure increases
- Structural features that support liquidity resilience
- Governance considerations for long-term investors

Register online at www.ifebp.org/canadainvest by September 25 to save C\$300!

Hotel Information

The Royal at Atlantis Paradise Island Nassau, The Bahamas

Reservation Deadline:

Monday, September 28, 2026

Rates: US\$299 single/double occupancy
(Additional fee of US\$50/person per day for a third and/or fourth guest)

Resort Fee: US\$25 per night per room plus
10% VAT

Hotel Accommodations: You will be charged a C\$500 deposit upon registration. Please specify your hotel requirements on the registration form. Visit our Hotel/Travel tab at www.ifebp.org/canadainvest-hotel for additional hotel information.

Important! *The Atlantis Hotel requires a credit card at check-in to pay for your full stay (minus your C\$500 deposit) plus a minimum of US\$150 per night for incidentals. While debit cards are accepted, the hotel will withdraw the full amount from your account rather than placing a hold.*

Hotel Cancellation Policy: Hotel deposit forfeited for reservations cancelled within 24 hours prior to arrival.

**Note: Hotel room availability is not guaranteed outside of scheduled program dates.*

Hotel Details

Revel in gorgeous views of The Bahamas and thoughtful service at The Royal at Atlantis Paradise Island. This resort boasts well-appointed rooms and suites that provide easy access to many attractions. The chic hotel rooms feature luxury bedding, flat-panel TVs and plenty of space for you to relax and recharge. Fuel up at one of the resort's many restaurants, highlighting local Bahamian flavours, celebrity chefs and casual meals. Spend an afternoon at Mandara Spa for exotic spa treatments, golf the fairway at Ocean Club Golf Course or experience world-class luxury shopping at Crystal Court Shoppes. Make your island visit a legendary one at The Royal at Atlantis Paradise Island.



Build Your Case for Attending

In times of uncertainty, education serves as the cornerstone for smart, reasonable decision making. Now is the time to take advantage of every opportunity possible to gather the insights and knowledge that will strengthen your investment strategy, and the Canadian Investment Institute is your educational event to do just that.

The value of this education is crucial for your plan. Here are four discussion points to help sell your participation or the participation of your trustees to attend this November.

1

Three Days of Education

The Canadian Investment Institute offers three days full of learning with 15 sessions presented by Canada's leading investment strategy experts. Sessions are designed for those with intermediate to advanced knowledge of investing principles, providing key takeaways and action items you can implement into your strategy immediately.

2

Certificate of Attendance Is Available

Validate your participation by earning a certificate of attendance. You must attend 11 sessions to receive this electronic certificate.

3

Great Investment

Those in attendance walk away with access to all conference session presentations and takeaways for 60 days, allowing you to equip your team with the knowledge you have gained.

4

More Than Just Information

Attending the Canadian Investment Institute provides you with more than just the vital information you need. Registration includes opportunities to meet your peers from around the country during lunch and morning refreshment breaks each day as well as a welcome reception on Monday evening.

Looking for further assistance to affirm your attendance?

Visit www.ifebp.org/canadainvest-justification for a downloadable justification letter directed to an approving manager. This is a must-attend conference for those involved in plan investing—Ensure you or a member of your fund is there.

Advanced Trust Management Standards

Class size
is limited.
Register early.



Session A and Session B

Saturday, November 7 8:00 a.m.-4:30 p.m.

Sunday, November 8 8:00 a.m.-4:00 p.m.

Designed for the needs of experienced trustees, **Advanced Trust Management Standards (ATMS)** will give you the tools you need not only to be successful in your role as a trustee, but also to look toward the future and prepare your plan for the challenges ahead.

Who Should Attend

For trustees who have either completed the FTMS® Certificate of Achievement or passed the ATMS Qualifying Test, this is the perfect opportunity to continue your trustee training.

Targeted toward advanced-level appointed and elected multi-employer, public sector and corporate plan trustees/fiduciaries of any type of trust; members of pension advisory or benefit committees; and benefit office staff.

ATMS is recommended for trustees of both pension and health and welfare trust funds.



Prerequisites

Before enrolling in ATMS, you must either:

- Complete the FTMS Certificate of Achievement, earned by completing the classroom work and passing the accompanying test

OR

- Pass the ATMS Qualifying Test. Visit www.ifebp.org/atmsprereq for more information.

The ATMS program is sequential—Session A, including successful completion of the accompanying test, is a prerequisite for Session B. This will require attendance at two separate locations.

Sponsorship Opportunities

Connect With Decision Makers Who Matter

Position your organization at the forefront of the pensions and benefits industry by sponsoring the Canadian Investment Institute—an exclusive forum for experienced trustees, administrators and other senior investment professionals.

Meaningful Visibility. Lasting Impact.

Our sponsorship opportunities are designed to deliver high-value exposure before, during and long after the conference. Your organization will be front and center, from targeted preconference promotions and prominent website placement to high-visibility on-site signage, program materials and name badge recognition.

Sponsors also benefit from extended visibility through a six-month listing in our Service Provider Directory—keeping your brand top of mind well beyond the event.

Drive New Opportunities

Sponsorship gives you direct access to influential professionals who oversee significant pension and benefits assets. Engage in meaningful conversations with those actively seeking innovative solutions and strategic partners to address today's evolving investment challenges.



For more information or to discuss how you can maximize your participation as a sponsor, contact Diane Mahler, Manager, Business Development and Industry Engagement, at dianem@ifebp.org or (262) 373-7656.

Learn more at www.ifebp.org/sponsorships.

Canadian Investment Committee



(Chair)

Sylvie Méthot, CFA
Vice President,
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Toronto, Ontario



Tony Fanelli

Executive Director
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Head of Retail
Mackenzie Investments
Toronto, Ontario



**Gary K.Y. Yee,
MTMS, ICDD**

Pension Coordinator
Canadian Union of
Public Employees (CUPE)
Burnaby, British Columbia

We look forward to seeing you in Nassau, The Bahamas!

Nassau is nestled on the island of New Providence. Relax on the world-famous Cable Beach, explore the historic streets of downtown and discover a rich heritage that blends colonial charm with island flair. The city is a vibrant tapestry of culture, from the pastel-coloured colonial buildings of Parliament Square to the rhythmic energy of the Junkanoo festival. Browse the bustling stalls of the Straw Market for handcrafted souvenirs, tour the National Art Gallery of The Bahamas, or step back in time at the Pirates of Nassau Museum. From diving in the crystal-clear waters to exploring the lush Ardastra Gardens & Wildlife Conservation Centre, Nassau offers a playground of possibilities to seek excitement and unparalleled leisure.



REGISTRATION

Register today at www.ifebp.org/canadainvest.

CONFERENCE REGISTRATION FEES

Through September 25, 2026	Member: C\$2,125 Nonmember: C\$2,455
After September 25, 2026	Member: C\$2,425 Nonmember: C\$2,755

ATMS SESSION A OR SESSION B REGISTRATION FEES

Through September 25, 2026	Member: C\$2,075 Nonmember: C\$2,295
After September 25, 2026	Member: C\$2,375 Nonmember: C\$2,595

Save C\$300 when you register before September 25!

REGISTRATION INCLUDES

Breakfasts | Lunches | Beverage Breaks | Reception

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Registration fee is forfeited once program commences. For details and the current policy, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency. More information is available at www.ifebp.org/ce.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.



Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit www.cebs.org/compliance for additional information.



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