IIAC FinTech Summit

Merging the Worlds of Finance and Technology

Friday, June 1, 2018 | Vantage Venues, 150 King Street West, 16th Floor, Toronto
To register, visit the Investment Industry Association of Canada's website at iiac.ca/events

IIACACCVM

Merging the Worlds of Finance and Technology

FinTech innovations are revolutionizing the financial services industry, driving new business models, applications, processes and products. At the same time, FinTech technologies raise novel regulatory, technical and legal issues for firms and their customers. Join us on June 1, 2018 to hear from FinTech leaders who will share their insights on how Member firms can harness FinTech to trim costs, streamline operations and offer better value propositions to their clients. Learn from legal, regulatory and technical experts on how to navigate this new terrain. Network with peers, featured experts and visit vendors in the Broadridge Innovation Zone throughout the day and during the cocktail reception.

AGENDA

Breakfast – Courtesy of Croesus

Opening Remarks
Annie Sinigagliese, IIAC
Kuno Tucker, ITG Canada Corp.

DRAFT AGENDA SUBJECT TO CHANGE

FinTech: Legal considerations
Moderator: Susan Copland, IIAC
Julie Mansi, Borden Ladner Gervais LLP
Blair Wiley, Osler, Hoskin & Harcourt LLP
Laure Fouin, McCarthy Tétrault LLP

Elevator Pitch #1

FinTech Consultants: Sharing their knowledge
Intro: David Mastroberardino, Croesus
Moderator, David Tasker, Our Family Office Inc.
Matthieu Cardinal, Finance Montréal
Andrew Jappy, AIJ Consulting
Kendra Thompson, Accenture

Morning Break – Courtesy of Finance Montréal Inc.

Elevator Pitch #2

Cryptocurrency 101

Elevator Pitch #3

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Capitalizing on the Cloud
Marc Gunter, CIBC

Elevator Pitch #4

Google Technology Innovation
Ian Hutchinson, Google

Intro to Robo Panel: Robo Stats
Helen Hsia, ShareOwner

Latest update on Robo
Moderator: Amelia Young, Upside Consulting
Dave Nugent, Wealthsimple
Randy Cass, Nest Wealth
Jack Mastromattei, Aligned Capital Partners
Pramod Udiaver, Invisor

Cybersecurity Checklist
Kevin Kondo, CIBC Mellon

Elevator Pitch #5

Lunch – Courtesy of CIBC Mellon

Lunch Fireside Chat: Marketplace Innovation
Moderator: Kuno Tucker, ITG Canada Corp
Richard Carleton, The Canadian Securities Exchange
John Lee, TMX Group

Elevator Pitch #6

RegTech: Helping compliance and operations
Intro: Sam Webster, Portfolio Aid
Moderator: Michelle Sarmiento, Questrade
Rob Kirwin, VigilantCS
Ian Clark, CanChek
Boris Kusovski, IBM Watson

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Afternoon Break – Courtesy of Google

Elevator Pitch #7

How the regulators are using technology
Moderator: Frank Barillaro, Everton Carlisle
Victoria Pinnington, Investment Industry Regulatory Organization of Canada
Alexandru Badea, Ontario Securities Commission
Moad Fahmi, Autorité des marchés financiers

Artificial Intelligence: what's going on in the AI Labs?
Broadridge

Closing Remarks
Susan Copland, IIAC

Cocktail and Networking

Cocktails – Courtesy of Portfolio Aid

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Innovation Zone Booths

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