

CIRI'S 32<sup>ND</sup> ANNUAL INVESTOR  
RELATIONS CONFERENCE

# STAYING ON — COURSE



Halifax, Nova Scotia  
June 9–11, 2019



# STAYING ON ——— COURSE



There seems to be an ever-growing number of factors and distractions that influence the life of an investor relations practitioner. Whether it's the continual shift from active to passive investment strategies, the increased influence of ESG and sustainable development-oriented funds or the emergence of different investment options like ETFs and liquid alternative funds; then add in the changing regulations that influence the way we engage with investors (i.e. MiFID II), an IRO's job is never boring.

As the old adage goes "change is the only constant in life". What that means for those at the helm of investor relations is that quite often some form of bad weather is attempting to blow your company off course and onto the rocks. As a result, it's a constant challenge for the IRO to navigate their way forward through rough waters and keep their company safely on course to its desired destination.

With CIRI's 2019 Annual Conference being held in Halifax, and with a title theme of "Staying on Course", it's hard not to weave in some nautical terminology as we highlight what your voyage at the Conference will have in store for you.

There are a lot more factors than the short list discussed above that an investor relations professional has to address as they guide their company forward. We are very excited about the range of sessions we have planned for the Conference that will help you keep your IR program shipshape and seaworthy. You will have an opportunity to hear from several keynote speakers including:

- **Scott Balfour**, President & CEO, Emera Inc.
- **Deborah Fuhr**, Managing Partner & Co-founder, ETFGI
- **Colleen Johnston**, Director, Shopify and WestJet

You will also hear from Board members, fund managers, research analysts, capital market experts and governance specialists as well as fellow IROs from a broad range of industries and market caps. We're certain it will be a valuable (and educational) use of your time as well as a great opportunity to build your IR network and share in new experiences.

Beyond the Conference Program, we've organized several optional activities to enrich your experience and help you discover the treasures of Halifax and the surrounding area. These include a trip to Peggy's Cove, a Segway tour of Halifax and kayaking in the harbour.

We'd like to highlight and thank our fellow 2019 Annual Conference Committee members who have contributed their time, experience and creativity over the past months to assemble the program and solicit speakers. It's through their combined effort that we're certain you will enjoy your time in Halifax and depart with new insights and tools to navigate your way forward.

We look forward to seeing you at the Conference.

## Anchors aweigh!

### CONFERENCE CO-CHAIRS:

**Nathalie Megann**, CPIR  
Vice President, Investor Relations & Corporate Affairs  
Chorus Aviation Inc.

**Ryder McRitchie**  
Vice President, Capital Markets & Public Relations  
Jupiter Resources Ltd.

# 2019 ANNUAL CONFERENCE PROGRAM

## DAY ONE

Sunday, June 9

- 9:00am **Peggy's Cove Tour**
- 9:00am **City Spin Segway Tour**
- 9:00am **Halifax Harbour Kayak Tour**
- 12:00pm **Registration**
- 3:30pm **Perfecting Your Personal Pitch**  
As an IRO, you spend most of your time developing and pitching your company story. But what about developing and pitching yourself? During this session, gain insight on current market trends with respect to corporate hiring; key skill sets and characteristics sought for the IR role; and how you can best tailor your development. This will be an open, collaborative session with an opportunity to ask questions and gain insights into your own career development.
- 4:30pm **Business Wire Sponsored Session**
- 5:30pm **Conference Kick-off Cocktails**

## DAY TWO

Monday, June 10

- 7:00am **Registration / Breakfast with Exhibitors**
- 8:00am **Welcome & Opening Remarks**
- 8:15am **Emera: Canada's Energy Powerhouse**  
*Sponsored by CIBC*  
As one of Canada's largest investors in regulated electricity generation, Emera leads the way in delivering clean energy to customers and creating value for shareholders and communities. Scott Balfour, President & CEO, will talk about Emera's success, how it has been achieved, his views on the IR function and how IR contributes to the success of the organization.  
**SPEAKER:**  
Scott Balfour, President & CEO, Emera Inc.
- 9:15am **BREAKOUT SESSIONS (select one)**
- OPTION #1 A DEEP DIVE ON MARKET STRUCTURE**  
Canadian market structure continues to evolve and it is the IRO's job to understand how these changes impact their companies. A panel of experts will discuss major market structure changes including: SEC and CSA access fee pilots; market data fees; arrival of new marketplaces; MiFID II; and the growth in ETFs and their impact on liquidity. Learn how these factors may be impacting your stock.  
**SPEAKERS:**  
Peter Haynes, Managing Director, Index Products, Institutional Equities, TD Securities  
Kevin Sampson, President, Equity Trading, TMX Group  
Kevin Tyrrell, Senior Director, Strategy & Research, NYSE
- OPTION #2 EVOLVING APPROACHES TO IR MARKETING**  
*Sponsored by Rose & Company*  
With the evolving investor landscape, issuers are challenged to deliver meetings with quality investors to management. This session will highlight opportunities and approaches to creating a value enhancing marketing program that will help you to stay the course to attract new capital, maintain existing shareholders and navigate a world that is increasingly trading with the macro trends.  
**SPEAKERS:**  
Lorne Gorber, F.CIRI, Executive Vice President, Global Communications & Investor Relations, CGI Group Inc.  
Kyle Preston, Director, Investor Relations, Vermillion Energy Inc.

9:15am **OPTION #3 TRENDS IN ESG REPORTING**

*Sponsored by TMX Group*

ESG has literally become an alphabet soup so how can IROs make sense of it all? During this session you will get an overview of the key reporting frameworks; learn which of these are most commonly used by issuers and investors; and hear how issuers are integrating and leveraging ESG in their IR programs. Preliminary highlights of research conducted by CIRI and sponsored by the TMX Group will be shared.

**SPEAKERS:**

**Stephanie Amaimo**, Vice President, Investor Relations, Fortis Inc.

**Sarah Keyes**, Principal – Research, Guidance & Support, CPA Canada

**Eliza Riego**, Head, Product and Service Innovation, TMX Group (Moderator)

**Sophie Van Houtte**, Regional Head, TSX Company Services

10:15am **Break with Exhibitors**

10:45am **BREAKOUT SESSIONS (select one)**

**OPTION #1 M&A ACTIVITY & TRENDS**

Canada saw a strong market for M&As in 2018 but will this trend continue into 2019? Hear from a diverse panel of experts on the conditions that impact M&A activity, from the global economy to the political environment, plus hear how senior IROs have successfully navigated these high-stake transactions.

**SPEAKERS:**

**Tyler Burns**, Investor Relations, Canopy Growth Corporation

**Nick Kuzyk**, Chief Strategy Officer & Senior Vice President, Capital Markets, High Tide Inc.

**OPTION #2 ESG INTEGRATION: VIEWS FROM THE STREET**

*Sponsored by Corbin Advisors*

Once thought of as a niche perspective, today Environmental, Social and Governance (ESG) integration is gaining traction at investment houses big and small. Hear how representatives from the buy- and sell-side are using ESG data and integrating them into their models to meet client needs, analyze investment risk and drive value creation.

**SPEAKERS:**

**Philippe Bélanger**, Senior Adviser, Responsible Investment, Desjardins Global Asset Management

**Jennifer Coulson**, Vice President, ESG, BCI

10:45am **OPTION #3 STRATEGIC IR: BRINGING STREET INTELLIGENCE IN HOUSE**

As an IRO, you are responsible for the two-way dialogue between the company and the Street. While much of your time with capital market participants is spent discussing the company's strategy and performance, it is also important to listen to their views of the company and bring those in house. Hear how senior IROs are sharing these insights with management and the Board and how they may impact the strategy and messaging for the company.

**SPEAKER:**

**Lavonne Zdunich**, Director, Investor Relations & Communications, Keyera Corp.

11:45am **AGM, Awards Ceremony & Networking Lunch**

*Sponsored by West Corporation*

1:30pm **In Conversation with the Street**

As an IRO, the buy- and sell-side are your key external stakeholders and therefore play a vital role in your success. Not only must you deliver your company's messages to this audience, you must gather insights from them that can be shared with your management team and Board. Here's an opportunity to hear what they think on a variety of topics including: guidance; passive vs. active investing; ESG integration; MiFID II; plus what they expect from you.

**SPEAKERS:**

**Manash Goswami**, Senior Vice President, Portfolio Manager, First Asset

**Yuri Lynk**, Managing Director, Equity Research, Canaccord Genuity Corp.

2:30pm **Break with Exhibitors**

3:00pm **BREAKOUT SESSIONS (select one)**

**OPTION #1 INVESTOR TARGETING HOW TO**

While broker-sponsored marketing is one of the premier components of investor relations, new machine learning and tools are being increasingly adopted by IROs. Add to this, a post-MiFID II environment where brokers are less able to give issuers a good idea of investor targets owing to fewer direct conversations with investors. Hear from seasoned IROs who will share their experiences marketing in Canada and abroad using new tools and techniques for investor targeting. Leave this session with practical advice on how to target key markets and maximize your marketing efforts in an environment that places increased demands on IROs.

**SPEAKERS:**

**Marina Davies**, Associate Vice President, Investor Relations, Canadian Tire Corporation

**Dave Hughes**, Manager, Investor Relations, Imperial Oil Limited

3:00pm

**OPTION #2 PROXY SEASON: WHAT'S IR'S ROLE?**

*Sponsored by AST Trust Company (Canada)/D.F King*

Traditionally, proxy season has been managed almost exclusively by a company's legal team. However, expectations have changed and investors are increasingly looking for deeper engagement with a company with respect to a range of topics including corporate governance, Board composition, executive compensation and how these link to corporate strategy and performance. The result creates an important opportunity for IROs to leverage their skill set and relationships and work collaboratively with their legal coworkers in engaging with key investors to ensure a smooth vote.

**SPEAKER:**

**Karen Keyes**, Senior Vice President, Investor Relations, Aimia Inc.

**OPTION #3 A SNEAK PEEK: CIRI'S 2019 IR COMPENSATION & RESPONSIBILITIES SURVEY**

*Sponsored by Global Governance Advisors*

Highlights from CIRI's 2019 IR Compensation & Responsibilities Survey will be unveiled. This is your opportunity to learn how the role and compensation of investor relations professionals has evolved since CIRI's last survey in 2014 plus learn about IR best practices and trends.

**SPEAKER:**

**Paul Gryglewicz**, Senior Partner, Global Governance Advisors

**4:00pm ETFs: Challenge, Opportunity or Both?**

*Sponsored by TD Bank*

ETFs are now the investment industry's fastest growing product segment, representing \$6.5 trillion+ of global assets including \$150 billion+ in Canada. It's imperative that IROs stay current on major ETF trends as these passive investments impact how IROs interact with their shareholder base. Deborah Fuhr will provide insight on current global ETF themes, emerging product developments, institutional usage, the competitive landscape and more.

**SPEAKERS:**

**Deborah Fuhr**, Managing Partner & Co-founder, ETFGI

**Peter Haynes**, Managing Director, Index Products, Institutional Equities, TD Securities (Moderator)

**6:00pm Cocktails with Exhibitors**

**7:00pm CIRI's Kitchen Party**

**DAY THREE**

**Tuesday, June 11**

**7:30am Breakfast with Exhibitors**

**8:30am ESG: Investing with a Purpose**

ESG is having a significant effect on investing with \$2.13 trillion AUM dedicated to sustainable investments in Canada alone. How funds are incorporating ESG into their investment decisions, from ESG integration to negative screening to impact investing, varies from one asset manager to another. Learn about the prevalence of ESG investing globally; current trends; new initiatives; and its importance to issuers and investors.

**9:30am BREAKOUT SESSIONS (select one)**

**OPTION #1 MODEL BEHAVIOUR: HOW IROS TRACK & MAINTAIN INTERNAL MODELS & WHY**

In an environment where fewer sell-side analysts are required to cover an expanded company universe, analysts are relying more heavily on IROs to keep them informed on current trends and valuation inconsistencies in their financial models. During this session, you will learn what IROs are doing to manage this issue, including dedicating more internal resources to the effort and seeking third-party assistance to ensure models reflect key company drivers. Correcting errors and omissions, all while safely staying within the regulatory requirements around selective disclosure, are key issues facing IROs today.

**SPEAKERS:**

**Adam Borgatti**, CPIR, Senior Vice President, Corporate Development & Investor Relations, Aecon Group Inc.

**Patrick Ghoche**, Vice President, Investor Relations, Bombardier Inc.

**OPTION #2 PITCH PERFECT: CREATING A COMPELLING INVESTMENT STORY**

*Sponsored by BTV Business Television*

Ever get the feeling that your story is boring the person you're telling it to? Or worse, that you've completely confused them? Learning to tell stories to capture, direct and sustain the attention of others is a key leadership skill. In this session, you'll learn valuable tips to craft a simple and memorable story that effectively conveys your company's value proposition.

**SPEAKER:**

**Taylor Thoen**, CEO, Executive Producer, BTV-Business Television (Moderator)

9:30am **OPTION #3 AI: LANGUAGE QUANTIFIED**

Through AI, company disclosure is being reviewed to develop a lexicon unique to that company. This results in sentiment data that predicts the market impact of that company's disclosure. Investors are using this sentiment to make buy, sell and hold decisions, while the sell-side is using it to get an early gauge on company results to allocate their time more efficiently. Learn how your language is impacting sentiment and investment decisions and what you can do about it.

**SPEAKER:**

**Evan Schnidman**, Founder & CEO, Prattle

10:30am **Break & Prize Draws with Exhibitors**

11:15am **BREAKOUT SESSIONS (select one)**

**OPTION #1 GETTING YOUR C-SUITE MEDIA READY**

Your C-Suite has a special set of needs when dealing with the media. They must convey leadership and power and have absolute control during interviews. In this session, you'll hear how you can better prepare and support your Chiefs when dealing with the media.

**OPTION #2 SHAREHOLDER ACTIVISM: WHAT YOU NEED TO KNOW**

*Sponsored by AST Trust Company (Canada)/D.F King*

Imagine you are enjoying your Sunday morning coffee when a news release crosses the wire announcing that your company is the target of a proxy contest. What do you do? How do you respond? Join panellists who have recently managed through headline grabbing shareholder activism to learn how you can best prepare your company to defend against hostile advances.

**SPEAKER:**

**Laurie Gaborit**, Vice President, Investor Relations, Detour Gold Corporation

11:15am **OPTION #3 MIFID II: WHAT'S NEW?**

*Sponsored by IHS Markit*

It's been approximately 18 months since MiFID II came into effect and the repercussions for those looking to do business in Europe are becoming more evident. In fact, the disruption from this new regulation, changing how institutional investors engage with corporate access and research, has gone beyond European borders. Hear from a panel of senior professionals who have first-hand experience with navigating the new regulatory waters from different perspectives. Their knowledge and insights will help IROs understand the implications of MiFID II and what it means for all key stakeholders.

**SPEAKERS:**

**Mitchell Schacher**, Head of Americas Corporate Access, UBS Investment Bank

**Bevin Wirzba**, Senior Vice President, Business Development & Capital Markets, ARC Resources Ltd.

12:15pm **IR & The Board: How You Can Be a Trusted Advisor**

IROs have an interesting vantage point through their interactions with various capital market players. This session will explore the role of investor relations in the boardroom. Directors will provide insights on what matters most to Boards and how the IR function can deliver value and strategic perspective benefiting the Board, management and shareholders.

**SPEAKERS:**

**Colleen Johnston**, Director, Shopify and WestJet

**Maryse Saint-Laurent**, Director, Turquoise Hill Resources and Guyana Goldfields Inc.

1:30pm **Closing Remarks**

## STAYING ON COURSE

### CIRI's 32nd Annual Investor Relations Conference

Halifax Marriott Harbourfront Hotel  
Halifax, Nova Scotia  
June 9–11, 2019

## Fees

### Regular Rate – February 16 to May 24, 2019

CIRI Member: \$990.00 plus HST (15%) = \$1,138.50  
Non-Member: \$1,300.00 plus HST (15%) = \$1,495.00

### Late Rate – May 25 to June 11, 2019

CIRI Member: \$1,090.00 plus HST (15%) = \$1,253.50  
Non-Member: \$1,400.00 plus HST (15%) = \$1,610.00

### Membership/Conference Bundle

CIRI offers a membership bundle that includes an annual membership, a 2019 Annual Conference registration, CIRI's *Standards and Guidance for Disclosure* including the *Model Disclosure Policy, Fourth Edition* and *CIRI's Guide to Developing an IR Program, Third Edition*. Take advantage of this offer and save \$945 by visiting 'Member Services' on CIRI.org. If you have any questions about membership contact Yvette Lokker at [ylokker@ciri.org](mailto:ylokker@ciri.org).

### Refer a Friend

Refer a friend to become a CIRI member and receive a \$100 credit that can be applied to your 2019 Annual Conference registration, the 2019 Essentials of Investor Relations Program or next year's annual membership dues.

### Hotel

CIRI has arranged rooms at the Halifax Marriott Harbourfront Hotel at a special conference rate of **\$225/night** (plus applicable taxes). This rate is guaranteed until **May 7, 2019**. Reserve your room by visiting the 'Travel' section of the 2019 Annual Conference website. **Please ensure you book under the CIRI group rate as rooms booked outside of the group or at other hotels may result in additional costs to CIRI.**

### Optional Activities

Build your network while enjoying what Halifax has to offer. For complete details and to register visit the 'Socials' section of the 2019 Annual Conference website.

- City Spin Segway Tour
- Halifax Harbour Kayak Tour
- Peggy's Cove Tour



RETURN POSTAGE GUARANTEED  
PORT DE RETOUR GARANTI

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### Information at Your Fingertips

Get in on the discussion before, after and during the Conference, by using the hashtag: **#CIRI19**. Archived audio webcasts and speaker presentations will be available for download from CIRI.org following the Conference.

2019

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