

**ATTENTION:** Chief/Council, Mining/Energy Executives, Executive Directors, Aboriginal Consultants, Trust Officers, CEO's, Academic Leaders/Students, Educators, Ec Dev Officers, Program Mgrs, Band Admin, Finance, Aboriginal Business Owners, Band Mgrs, Elected Leaders, Law Firm Executives, Other Decision-Makers, All Interested Individuals and Groups

# 1-Day Indigenous Trust & Investment Workshop

For Indigenous People, by Indigenous People

September 20, 2016  
Vancouver, BC

Vancouver Marriott Pinnacle Downtown Hotel

Sharing Success



NATOA and co-host New Relationship Trust, invite you to join us at the 1-day Indigenous Trust & Investment Workshop **'Sharing Success'** held in Vancouver, BC at the Vancouver Marriott Pinnacle Downtown Hotel. The Workshop is designed to provide an informative and interactive venue for all those involved with Aboriginal Trusts, including topics specific to Communities in B.C. Speakers and facilitators will represent Aboriginal Communities who will share their successes of how they have established or in the process of establishing, and maintained prosperous Trust operations, and the steps they took to succeed. Corporate Industry presenters will also talk about how they effectively service and help these Communities succeed.

**Tradeshow!**  
**Informative Workshops!**  
**Engaging Keynote Speakers!**

## AGENDA (subject to change)

9:00 am – Welcome

9:15 am – **First Nation Investment Opportunity** – Michael Bonshor, CPA (CMA) and Ryan Smith, Terragenex – Ainchut Business Group and its partner Terra Genex Inc. This direct investment portfolio creates an exciting opportunity for First Nations to diversify their investment portfolio; in a new and attractive investment space generally not available to First Nations in Canada previously.

10:30 am – Networking Break

10:45 am – Gwa'sala-'Nakwaxda'xw – Leslie Walkus

12:00 pm – Lunch Break

1:00 pm – **Program Policies** – Diane Bigfoot and Shelley Ergang of Prophet River First Nation – How to develop and implement the Program Policies.

2:00 pm – **Investment Consultant – Roles and Responsibilities (Panel)** – Andrew Hoffman, CFA; Jeff Frketich, CFA; Jeff Harris, LLP; Don Woods, TD Bank – Performing a specific job effectively and efficiently can give the impression a provider's skills and qualifications are broader and deeper than may be the case. With education, experience and success in one area, a provider may venture beyond their core competency in an attempt to be more helpful or to increase their compensation – both have the potential to be detrimental to the management of your Trust. This panel discusses key competencies and boundaries of different financial service providers.

3:00 pm – Networking Break

3:15pm – **Pooled vs. Segregated** – Lisa Caswell and Leanne Flett Kruger – Pros vs. cons and when do you move them?

**LAST CHANCE TO REGISTER!**  
Only 7 days left until the event!

## SPEAKERS

Michael Bonshor	Lisa Caswell
Jeff Frketich	Jeff Harris
Andrew Hoffman	Leanne Flett Kruger
Ryan Smith	Leslie Walkus
Don Woods	Diane Bigfoot
Shelley Ergang	

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