

ATTENTION: Chief/Council, CEO's, Executive Directors, Band Managers, Trust Officers, Educators, Finance, Program Managers, Ec.Dev. Officers, Band Administration, Aboriginal Business Owners, Aboriginal Consultants, Elected Leaders, Academic Leaders/Students, Mining/Energy Executives, Law Firm Executives, All Interested

Reconciliation and Responsible Investment Workshop

September 20, 2017

Delta Hotels by Marriott Grand Okanagan Resort • Kelowna, BC

SHARE and NATOA have developed the Reconciliation and Responsible Investment workshop series to provide Aboriginal Trusts with the opportunity to deepen their understanding of responsible investment approaches and to explore the challenges and opportunities associated with considering community values and community development aspirations in the management and investment of Aboriginal trusts. The workshops will feature sessions on topics such as:

- Responsible investment and fiduciary duty
- How to work effectively with investment managers on responsible investment
- Case studies of responsible investment strategies to promote reconciliation, the protection of Indigenous People's rights and aboriginal employment, training and economic development

The workshops will provide opportunities for broad participation from participants to ensure meaningful discussions and knowledge-sharing on the opportunities for innovative investment strategies that reflect both prudent management and preservation of trusts along with broader community values and community development mandates.

REGISTER TODAY!

GoToRegister.ca/NATOA

Toll Free: 1-866-409-1315

Fax: 1-866-462-7648

Email: NATOA@GoToRegister.ca

Agenda

- 9:00 – 9:15** **Opening Welcome and Prayer**
- 9:15 – 10:00** **Delegate Introductions and Expectations for the Day**
- 10:00 – 10:45** **Aligning Our Financial Assets With Our Cultural Values**
Jason Campbell, CEO, Sovereign Power, Spokane Tribe of Indians
Moderator: Vanessa Mountain, Trustee, St'át'imc 2011 Trust
- 10:45 – 11:00** **Break**
- 11:00 – 11:45** **Overview of Responsible Investment Approaches**
Speaker: Peter Chapman, Executive Director, SHARE
- 11:45 – 12:30** **Responsible Investment and Fiduciary Duty**
Speaker: Ratcliff & Company LLP
- 12:30 – 1:30** **Lunch**
- 1:30 – 2:30** **Working with Investment Managers on Responsible Investment**
Speakers: Andrew Hoffman, Portfolio Manager, Leith Wheeler
Jeremy Bell, George & Bell Consulting
Cliff Fregin, CEO, New Relationship Trust
Moderator: Mark Sevestre, President, NATOA
- 2:30 – 2:45** **Break**
- 2:45 – 4:00** **Aligning Investments with Reconciliation, Indigenous Peoples' Rights and Community Economic Development Goals**
Panellists: Delaney Greig, Engagement Analyst, SHARE
Stewart Anderson, Vancity Credit Union
Reaching out to the Ktunaxa Nation Council
- 4:00 – 4:30** **Closing**

The workshop is **FREE** to all NATOA members

\$200 Indigenous non-NATOA delegates

\$500 Industry non-NATOA delegates



Leith Wheeler
INVESTMENT COUNSEL LTD.

Quiet Money.

SHARE
SHAREHOLDER ASSOCIATION
for RESEARCH & EDUCATION



This message delivered by Aboriginal Link® - Communications for Canadian Aboriginal Peoples

To be removed from this distribution list, please visit www.opt-out.ca and enter Campaign Code 306

Aboriginal Link, PO Box 50058, 17 - 2595 Main Street, Winnipeg, MB, R2V 4W3, Phone/ Fax: 1-866-440-7257

ID 306