

## FINAL AGENDA

### Day 1 - November 2

TIME	SESSION
8:00 am	<b>Registration, continental breakfast</b>
9:00 am	<b>Welcome &amp; conference kick-off</b> Elizabeth Mulholland, Chief Executive Officer, Prosper Canada John Capozzolo, Senior Vice President, TD Bank Group
9:15 am	<b>Greetings from the Government of Ontario</b> Honourable Deb Matthews, Deputy Premier, President of the Treasury Board and Minister Responsible for the Poverty Reduction Strategy
9:30 am	<b>Indigenous opening</b> Amy Desjarlais
9:45 am	<b>Setting the Stage: Improving financial wellbeing through financial empowerment</b> Adam Fair, ABLE Steering Committee Chair and Director of Programs, Prosper Canada Donna McBride, Director of Operations, Momentum  Financial empowerment is an approach to poverty reduction that focuses on improving the financial wellbeing of people living on low incomes. This session will outline the financial empowerment movement and explore how we can align our work locally and nationally to achieve greater impact.
10:00 am	<b>Networking activity</b> An opportunity to make connections with conference attendees from across the country representing all sectors.
10:20 am	<b>Health check: Low-income household finances in Canada</b> Elizabeth Mulholland, Chief Executive Officer, Prosper Canada  Research presentation on the overall financial state of low-and modest income households and how this compares with Canadians generally. See how assets, debt, and financial inclusion – as well as income – affect financial well-being.
10:40 am	<b>BREAK</b>
11:00 am	<b>Why household financial stability matters</b> Ray Boshara, Director, U.S. Federal Reserve Center for Household Financial Stability  The U.S. Federal Reserve has made rebuilding household financial stability a national priority. Hear what they are learning about the drivers of household financial vulnerability, and what types of innovative policies and products are emerging as a result.
11:20 am	<b>What should we be doing to help low- and modest income households to build their financial well-being?</b> A conversation with Canadian respondents who will provide perspectives on the role of all sectors in Canada. <u>Moderator:</u> Ellen Roseman, Journalist, The Toronto Star <u>Panellists:</u> Jennifer Robson, Assistant Professor at Kroeger College, Carleton University Louise Simbandumwe, Director, Asset Building Programs, SEED Winnipeg Dr. Gary Bloch, Family Physician, St. Michael's Hospital and co-Chair, Ontario College of Family Physicians' Committee on Poverty and Health St. Michael's Hospital Ray Boshara, Director, U.S. Federal Reserve Center for Household Financial Stability
12:20 pm	<b>LUNCH</b>
12:40 pm <i>during lunch</i>	<b>Scarcity: Why having too little means so much</b> Dr. Eldar Shafir, Member of President Obama's Advisory Council on Financial Capability, Professor of Psychology and Public Affairs, Princeton University and CIFAR Senior Fellow  Dr. Shafir will share insights on the effects of poverty on decision-making from his new book, <i>Scarcity: Why Having Too Little Means So Much</i> .

1:20 pm	<p><b>Launch of National Financial Literacy Month</b>  <b>Pat Foran</b>, CTV Journalist  <b>Jane Rooney</b>, Canada's Financial Literacy Leader</p> <p>Help launch Financial Literacy Month with Canada's Financial Literacy Leader.</p>
1:40-2:10 pm	<p><b>Financial literacy: Reflections from the TD Financial Literacy Grant Fund</b>  <b>Scott Mullin</b>, Vice President of Community Relations, TD Bank Group  <b>Elizabeth Mulholland</b>, Chief Executive Officer, Prosper Canada</p> <p>What have we learned and where do we go from here?</p> <p style="text-align: right;"><i>Sponsored by: TD Bank Group</i></p>
<b>Transition to next session</b>	
2:25 pm	<p><b>Financial literacy breakout sessions</b>  Explore the specific financial literacy challenges of different populations, what's working, new ideas and priorities we can move forward on together.</p> <p><b>Session 1: People living on a low income</b>  <b>Carlen Scheyk</b>, Financial Literacy Facilitator, Momentum  <b>Michelle Ackland</b>, Employment and Financial Literacy Coordinator, The Candora Society of Edmonton  <b>Al Antle</b>, Executive Director, Credit Counselling Service of Newfoundland and Labrador</p> <p style="text-align: right;"><i>Sponsored by: TD Bank Group</i></p> <p><b>Session 2: People living with a disability</b>  <b>Zanna Joyce</b>, Program Facilitator, Society for Manitobans with Disabilities  <b>Jo-Anne Bryan</b>, Manager of Deaf Adult Services, Silent Voice  <b>Joel Crocker</b>, Director, PLAN Institute</p> <p style="text-align: right;"><i>Sponsored by: Financial Consumer Agency of Canada</i></p> <p><b>Session 3: Aboriginal peoples</b>  <b>Meaghan Daly</b>, President, Forward Vision Games  Nene Kraneveldt, Member, Indigenous Financial Literacy Committee  <b>Dr. Paulette Tremblay</b>, Vice President, Education and Training, AFOA Canada</p> <p style="text-align: right;"><i>Sponsored by: TD Bank Group</i></p> <p><b>Session 4: Newcomers to Canada</b>  <b>Tulia Castellanos</b>, Director, Strategic Community Engagement, Family Services of Greater Vancouver  <b>Florence Brake</b>, Independent Financial Literacy Facilitator  <b>Brian Smith</b>, Vice-President, Quebec Operations, Canadian Foundation for Economic Education</p> <p style="text-align: right;"><i>Sponsored by: TD Bank Group</i></p> <p><b>Session 5: Youth</b>  <b>John Sharpe</b>, CEO, Partners for Youth  <b>Dominique Leonard</b>, Research Associate, Social Research and Demonstration Corporation (SRDC)  <b>Mark Schuler</b>, Manager, Program Design and Evaluation, Springboard</p> <p style="text-align: right;"><i>Sponsored by: Financial Consumer Agency of Canada</i></p>
3:25 pm	<b>BREAK</b>
3:45pm	<p><b>Financial empowerment breakout sessions</b>  Learn more about the broader suite of innovative, proven solutions that build the financial well-being of people with low incomes and how these are being put to work in communities in Canada.</p> <p><b>Session 1: One-on-one financial counselling/coaching</b>  <b>Hélène Menard</b>, Executive Director, EBO Financial Education Centre (Entraide budgétaire Ottawa)  <b>Lynne Woolcott</b>, Director of Community Response and Advocacy, West Neighbourhood House  <b>Sally Massey-Wiebe</b>, Financial Counsellor, Community Financial Counselling Services</p> <p style="text-align: right;"><i>Sponsored by: Financial Consumer Agency of Canada</i></p> <p><b>Session 2: Accessing income boosting benefits and tax credits</b>  <b>Nicole Chambers</b>, Assessment, Benefit and Service Branch, Canada Revenue Agency  <b>John Midgely</b>, Head of Government Relations, Intuit Canada  <b>Althea Arseneault</b>, Manager of Resource Development, NB Economic and Social Inclusion Corporation  <b>Tanya Raso</b>, Mobile Community Financial Worker, Jane/Finch Community and Family Centre</p> <p style="text-align: right;"><i>Sponsored by: TurboTax</i></p> <p><b>Session 3: Safe and affordable products and services</b>  <b>Maia Graham-Derham</b>, Manager, Financial Access Program, Assiniboine Credit Union  <b>Jocelyn Friesen</b>, Administrative Coordinator, SEED Winnipeg  <b>John Stapleton</b>, Social Policy Consultant, Open Policy Ontario</p> <p style="text-align: right;"><i>Sponsored by: Financial Consumer Agency of Canada</i></p> <p><b>Session 4: Saving and asset building opportunities</b>  <b>Jenn Bogoch</b>, Manager, Asset Building Programs, SEED Winnipeg  <b>Kaila Basilij</b>, Program Director, SmartSAVER  <b>Kara Boles</b>, Proof of Possibilities Coordinator, The Winnipeg Boldness Project</p> <p style="text-align: right;"><i>Sponsored by: Meridian</i></p> <p><b>Session 5: Consumer awareness and protection</b>  <b>Courtney Hare</b>, Public Policy Manager, Momentum  <b>Frank Denton</b>, Assistant Deputy Minister, Ministry of Consumer Services</p> <p>How provinces and cities are dealing with payday lending.</p> <p style="text-align: right;"><i>Sponsored by: IIROC</i></p>
5:00-7:00 pm	<b>EVENING RECEPTION</b>

## Day 2 – November 3

8:00 am	<b>Registration and continental breakfast</b>
9:00 am	<b>Framing the day: Aligning for Impact</b> Adam Fair, ABLE Steering Committee Chair and Director of Programs, Prosper Canada
9:30 am	<b>Building a movement together</b>
10:00 am	<b>Learning exchange</b>
11:00 am	<b>BREAK</b>
11:30 am	<b>The role of financial institutions in improving financial wellbeing for people living on low income</b> <b>Moderator:</b> Amanda Lang, Producer and Anchor, Bloomberg Television Canada <b>Panellists:</b> Valérie Picher, Director, Community Relations, TD Bank Group Lauren Dobell, Director of Strategic Partnerships and Advocacy, Vancity Maia Graham-Derham, Manager, Financial Access Program, Assiniboine Credit Union Sandra Huculak, Managing Director, Corporate Social Responsibility & Community Investment, ATB Financial Jeff Brown, Vice President, Community Banking, Meridian  <i style="text-align: right;">Sponsored by: Meridian</i>
12:30 pm	<b>LUNCH</b>
1:30-2:45 pm	<b>Aligning For Impact breakout sessions</b>
	<b>Session 1: Innovation in short term lending products</b> Brenton Peck, Manager, Center for Financial Services Innovation Carlen Scheyk, Financial Literacy Facilitator, Momentum Lauren Dobell, Director of Strategic Partnerships and Advocacy, Vancity
	<b>Session 2: The Power of Collaboration</b> Lianna Chondo, City Wide Community Building Social Worker, City of Edmonton Tamara Lindsay, Principal, Cities for Financial Empowerment Fund, Inc. Salimah Kassam, Manager, Financial Empowerment, United Way Calgary Barry Rieder, Community Minister, Jane-Finch Community Ministry  <i style="text-align: right;">Sponsored by: Bridgehouse Asset Managers</i>
	<b>Session 3: Building a shared policy and research agenda</b> Courtney Hare, Public Policy Manager, Momentum David Rothwell, Assistant Professor, McGill University School of Social Work Jerry Buckland, Professor of International Development Studies, Menno Simons College  <i style="text-align: right;">Sponsored by: The Canadian Real Estate Association</i>
	<b>Session 4: Models that scale</b> Nicole Chambers, Assessment, Benefit and Service Branch, CRA Mack Rogers, Director of Programs, Community, ABC Life Literacy Cairine Wilson, Vice-President, Citizenship, Chartered Professional Accountants of Canada  <i style="text-align: right;">Sponsored by: Canadian Bankers Association</i>
	<b>Session 5: The funding gap: How do we pay for our work?</b> Troy Tisserand, President, 4 Pillars Ian Bird, CEO, Community Foundations of Canada Tracey Robertson, Strategy Lead Prosperous People, Ontario Trillium Foundation
	<b>BREAK</b>
3:15 pm	<b>Panel discussion: Aligning for impact</b> Panel reflecting on learning from successful collective impact initiatives <b>Moderator:</b> Ian Bird, CEO, Community Foundations of Canada <b>Panellists:</b> Graham Clyne, Executive Director, Peel Children and Youth Initiative Althea Arsenault, Manager of Resource Development, NB Economic and Social Inclusion Corporation Jonathan Mintz, President and Chief Executive Officer, Cities for Financial Empowerment Fund May Wong, Executive Director, Omega Foundation  <i style="text-align: right;">Sponsored by: TurboTax</i>
4:15-5:00 pm	<b>Springboard to action</b> Elizabeth Mulholland, Chief Executive Officer, Prosper Canada