SALENTICA

Wealth Management Symposium
Thursday, Nov 12. 2009
121 King Street West, 17th Floor Conference Centre
Toronto, Ontario

Preparing for the Recovery

Wealth management firms are beginning to see renewed strengths in the market and are looking to the future of client servicing. What will be the impact on how wealthy clients deal with their wealth management firms? How will changes in technology and client expectations change the way wealth advisory firms manage their clients?

Salentica is hosting a Wealth Management Symposium to provide insights and ideas to help plan for the economic recovery.

Why Attend?

The Wealth Management Symposium is an opportunity to listen, learn and trade ideas on managing wealthy clients. The session will be geared to the needs of senior advisors and partners of Wealth Management and Family Office firms. Our panel discussion will provide insights and ideas from professionals with extensive experience in working with wealth management firms. We look forward to an interactive session for attendees and panel members to exchange and discuss ideas.

Additionally, many of our clients have asked us how they can use Social Networks like Facebook and Twitter to attract more opportunities. We have asked Social Networking expert Andrew Cherwenka of Trapeze to provide insights into how to leverage this new technology and brand your firm in this new and growing area.

Panel Discussion -

The discussion will focus on challenges, trends and opportunities in the wealth management and family office market. The panel will include:

- **Dr. Tania Neild, President of Infograte** - Tania has spent more than 10 years in financial services, including providing strategic planning services for wealth management and family office firms throughout the US. She is fully entrenched in the high net worth marketplace, from single- and multi-family offices to independent advisors and private banks. As the CTO and COO of Private Client Resources, she built the platform into a fully operational family office reporting system that tracked more than $6 billion in assets. While serving as the CTO and Managing Director of Envestnet Asset Management, Dr. Neild built the separately managed account platform that was recognized by Forbes as "Best of the Web" in 2001.
- **Gary Brent, Chairman, HighView Financial Group** - Gary brings over 30 years of experience in the Financial Services sector. Prior to co-founding HighView Financial Group, Gary was Chairman and Chief Investment Officer of RBC Global Private Banking. Before joining RBC, he held the position of President and Chief Executive Officer of CT Investment Management Group, until Canada Trust's sale to TD Financial Group in 2000.

- **Tim Cestnick, President, The WaterStreet Group** - Tim enjoys a reputation as one of Canada's most respected experts and public speakers in the area of tax and personal finance. Tim's national speaking profile is confirmed by his position as tax columnist for the Globe & Mail's Report on Business, Canada's national newspaper. In addition to print media, Tim is a regular contributor and on-air personality on radio and television. He appears regularly on Canada AM, CBC Newsworld, BNN (formerly ROB TV), and the best-known money programs in the country.

Social Networking - The impact and opportunity for wealth management firms

What is the impact of social networks like Twitter and Facebook? How does it affect your branding and interaction with clients? Many firms know there will be an impact, but are not sure what it will be and how to address. Andrew Cherwenka of Trapeze, an expert in the area of Social Networking and its impacts on both wealth management firms and clients will provide an overview of this growing phenomena to help you gain a better understanding of the opportunities and challenges provided by Social Networking.

To register yourself and/or a colleague, email or call Anke Buhay at abuhey@salentica.com or 416-366-3456 x238.

Salentica Wealth Management Symposium Agenda

Time	Topic	Presenter
9:15-9:30	Registration	- -
9:30 – 10:15	Social Networking's Impact on Wealth Management firms	Andrew Cherwenka, Trapeze
10:15 – 10:30	Break; refreshments	- -
10:30 – 11:45	Best Practices in Client Management	Panel Discussion
11:45 – noon	Wrap-up	Bill Rourke, Salentica