

**May 6 - 8**  
**2014**  
Marriott Niagara Falls  
Niagara Fall, ON

# 10<sup>th</sup> Annual Aboriginal Trust and Investment Workshop

## Creating and Managing Wealth for Aboriginal Communities

Rodgers Investment Consulting welcomes you to attend the tenth annual Aboriginal Trust and Investment Workshop. The three-day workshop is designed to educate and engage participants in discussion on the fundamentals of Aboriginal Settlement Trusts and Investment Management.

For the 10th Anniversary, we will be adding 2 new areas for in depth analysis and discussion:

**1. Impact Investing, or using both your capital and income to further the development of the Aboriginal economy**

Impact Benefit Agreements and Aboriginal and Industry Partnerships have the potential to create significant wealth for communities. Many IBA's and Partnerships will also result in Trusts or long term capital pools. This year's Workshop will address some of the issues related to these trusts and capital pools.

**2. Qualifying Donee Registration and the potential to work with the philanthropic sector to further the development of Aboriginal Communities**

Special sessions will address how Aboriginal Communities can apply for funding and what funders are looking for.

**Participants will learn:**

- Impact and SRI Investing
- Qualifying Donee Registration
- Philanthropic Funders Panel
- Fiduciary Duty & Conflict of Interest
- The "Investment Challenge Game"
- Impact Benefit Agreements and Industry Partnerships
- Effectively Manage and Invest Settlement
- Capital and Resource Revenue
- Learn about Successful Strategies from Communities across Canada
- Meet leading Tax, Trust Law & Investment Experts
- Building Endowments from Resource Revenue
- Special Keynote Speakers

*"I value the learning and sharing from others. Their experiences help in our daily lives as trustees, and trust managers to fulfill our roles and responsibilities effectively and efficiently. Thank to Rodgers Investment Consulting for bringing investment and other professional industries together with the grassroots Aboriginal people!"*

- Alanna J.

*"I particularly enjoyed the hands on approach with the investment exercises, as this made you aware of factors beyond your control and potential impacts on your investment strategy."*

- Hans M.

I would like more information about the Workshop

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Tel: (\_\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

Please fill out and fax to 1-866-644-3027

**RODGERS INVESTMENT CONSULTING**

Phone: 1-866-644-2990

Fax: 1-866-644-3027

E-mail: RIC@GoToRegister.ca

Website: www.GoToRegister.ca/RIC

