

**May 6 - 8  
2014**  
Marriott Gateway  
on the Falls  
Niagara Falls, 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

**To register or view the Agenda, please visit [www.GoToRegister.ca/RIC](http://www.GoToRegister.ca/RIC)**

**For more information:**

**Toll Free: 1-866-644-2990**

**Fax: 1-866-644-3027**

**E-mail: [RIC@GoToRegister.ca](mailto:RIC@GoToRegister.ca)**

**Web: [www.GoToRegister.ca/RIC](http://www.GoToRegister.ca/RIC)**

**Evening Gathering  
Live Entertainment:  
The Magic of Greg Frewin**

**Speakers Include:**



**Jaimie Lickers  
Gowlings**



**Don Cranston  
CGOV Asset  
Management**



**Steven Smith  
Beutel Goodman  
Private Client  
Group**



**Alanna Jones  
NATOA**