

ATTENTION: Chief & Council, Financial Officers, Band Management, Trustees, Trust Managers, Department Heads



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

10th 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 and Conflict of Interest
 - The "Investment Challenge Game"
 - Impact Benefit Agreements and Industry Partnerships
 - Building Endowments from Resource Revenue
- NEW Session** ⇒ • Impact of Bill C-27 First Nations Financial Transparency Act on Trust Development and Structuring
- Effectively Manage and Invest Settlement
 - Capital and Resource Revenue
 - Learn about Successful Strategies from Communities across Canada
 - Meet leading Tax, Trust Law and Investment Experts

Speakers Include:



Victoria Grant,
The Circle on Philanthropy and Aboriginal Peoples in Canada



Patrick Wedaseh Madahbee,
Grand Council Chief, Anishinabek Nation



Jeff Harris,
Myers Weinberg



Wayne Wilson,
Lincluden

To register or view the Agenda, visit www.GoToRegister.ca/RIC

For more information or to register:

Toll Free: 1-866-644-2990

Fax: 1-866-644-3027

E-mail: RIC@GoToRegister.ca

Web: www.GoToRegister.ca/RIC

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



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