13th Annual Alternative Investment Outlook Forum

CONTENT SUMMARY

ALERNATIVE STRATEGIES – Canadian Review

- Comparison of public alternative strategies (i.e. hedge funds & liquid alternatives) in Canada
- Their performance vs. global peers and in different market conditions

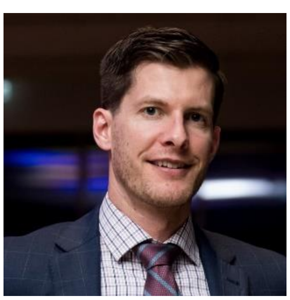
Reid Baker, VP of Analytics & Data – Fundata, Canada Inc.

DISCUSSION WITH LEADING ALLOCATORS: Institutional Investment & Private Wealth

- Portfolio structure and considerations
- Use of alternative strategies
- Alternative investment trends and allocation
- Opportunities, challenges and outlook

Dawn Jia, CFA, President & CEO – UBC Investment Management Trust Inc.
Brad Simpson, Chief Wealth Strategist – TD Wealth
Moderator
Yannick Archambault, CFA, Partner, National Leader - Family Office – KPMG Canada

SPEAKER BIOS



REID BAKER

VP of Analytics & Data – Fundata Canada Inc.

Reid Baker is Vice President of Analytics & Data at Fundata where he and the team are responsible for data analytics, data quality and new analytical product development including: the Fundata ESG Ratings, the Canadian Hedge Fund Risk Ratings, and the FundGrade A+ methodology. He also developed the methodology for the FundGrade A+ RI awards, to recognize the best performing RI funds.

Reid chaired the Canadian Investment Funds Standards Committee for 8 years, leading the committee through numerous policy and category changes including most recently a process for identifying responsible investing funds. Reid is a frequent contributor to publications such as *'Your Guide to ETF Investing'*, *'Your Guide to Responsible Investing'* and CIFPs' *'Current Trends and Issues in Financial Planning'* and has appeared on BNN Bloomberg and several conference panels. He holds the Chartered Enterprise Risk Analyst (CERA) designation and the Associate (ASA) designation from the Society of Actuaries.

13th Annual Alternative Investment Outlook Forum

DAWN JIA, CFA

President and CEO - UBC Investment Management Trust Inc.

Dawn Jia is responsible for the overall investment activities and monitoring of the portfolios under UBC IMANT's oversight. She also oversees the operations of UBC IMANT and provides strategic and operating objectives to the organization.

Prior to joining UBC IMANT, Dawn was a Senior Portfolio Manager at the Canada Pension Plan Investment Board (CPPIB). At CPPIB, Dawn and her team were responsible for ensuring that the total portfolio delivered on its overall mandate, by rebalancing it to the desired systematic exposures. Before Dawn joined CPPIB in 2013, she was Vice President and Head of Active Equity for North America at State Street Global Advisors. Previously, she was an equity portfolio manager at Barclays Global Investors and a quantitative strategist at CIBC World Markets.

Dawn is a Board member of Vancouver Foundation and the Vice Chair of its Investment Committees. She also serves on the Investment Committee of the Ontario Hospital Association (OHA). Dawn is a founding member of the Advisory Board of Western University's Master of Financial Economics program. Dawn received her MBA from the Ivey Business School and an MS in Engineering from Tianjin University in China. She is also a CFA charterholder.

BRAD SIMPSON

Chief Wealth Strategist – TD Wealth

With over thirty-one years in asset management, Brad Simpson brings an abundance of experience to his role as the Chief Wealth Strategist and Head of Wealth Investment Office at TD Wealth including: Chief Hedge Fund Strategist, Chief Investment Officer and Portfolio Manager. He is a member of the TD Wealth Asset Allocation Committee and Chairs the Private Wealth Management Investment Policy Committee and Investment Management Committees.

Brad is considered one of Canada's thought leaders on portfolio construction. He is a sought-after and respected speaker who travels across Canada sharing his unique perspective on investment strategy, risk management and behavioural economics with wealth management clients. Brad is also frequently asked to provide his perspective on breaking macroeconomic and financial issues for major media outlets. He holds a BA in History from University of Victoria and is a Chartered Investment Manager and a Fellow of the Canadian Securities Institute.

13th Annual Alternative Investment Outlook Forum

YANNICK ARCHAMBAULT, CFA

Partner, National Leader – Family Office – KPMG Canada

Yannick Archambault leads KPMG's National Family Office practice in Canada, and works with KPMG's Tax, Law, Audit, Advisory and Family Office leaders across Canada and globally to provide integrated services and advice. He brings 30 years of experience with High-Net-Worth and Ultra-High-Net-Worth individuals and families, family businesses, single-family offices (SFO) and multi-family offices (MFO), and has held numerous leadership roles within the financial services sector, serving clients in Canada, the US and Asia.

Yannick holds a Kellogg-Schulich Executive MBA, a Bachelor of Commerce in Finance from HEC Montreal and the Chartered Financial Analyst (CFA) designation.