



# “Be a Part of Your Community’s Future”

**May 23-24**  
**2018**  
 The Banff Centre | Banff, AB

## NATOA 5th Annual Indigenous Trust and Investment Conference



### PRE-WORKSHOP - TUESDAY, MAY 22, 2018

- 9 am - 5 pm Reconciliation and Responsible Investment Workshop
- 7:00 pm NATOA Annual General Meeting

### DAY 2 - THURSDAY, MAY 24, 2018

- 9:00 am Communication Barriers: What Are They And How Can You Overcome Them?
- 10:00 am Break
- 10:15 am Breakout Sessions:
  - Trust Advanced
  - Implementing Your Values Into Your Investments
  - Amending Trusts - Making Your Trust Work For Your Community
  - The Value Of Values: Getting Results That Are Authentic For You
- 11:15 am Breakout Sessions:
  - Tales From The Advisory
  - Two Perspectives On Investing
  - Spending Policies
  - **PLAY - The Promoting Life-Skills in Aboriginal Youth (PLAY) program partners with more than 85 First Nations communities to deliver safe, fun and educational programming for Aboriginal children and youth.**
  - Making Your Resources Work For You
- 12:15 pm Lunch
- 1:15 pm Breakout Sessions:
  - Investment Advanced
  - First Nations Wealth Management Through Good Governance
  - Effectively Monitoring Your Service Providers
  - Financial Literacy For The Everyday Trustee
- 2:15 pm How To Get Control Of Your Ottawa Trust Fund
- 3:15 pm Door Prize - Air Canada Gift Card

### DAY 1 - WEDNESDAY, MAY 23, 2018

- 9:00 am Opening Ceremonies
- 9:30 am Business Chemistry
- 10:30 am Break
- 10:45 am Ngai Tahu Charitable Trust
- 11:45 am Breakout Sessions:
  - Trust Structures - What Works Best For You And Your Community
  - Trust Basics
  - Investment Basics
  - **Youth Engagement**
- 12:45 pm Lunch
- 1:45 pm Breakout Sessions:
  - **Financial Literacy - Youth**
  - TBD
  - Reconciliation & Responsible Investments
  - Impact Investing
- 2:45 pm Breakout Sessions:
  - Community Success Stories
  - Trust Investments To Work Together To Create Planned Outcomes
  - **Indigenous Women - What It Takes To Succeed In Today’s World**
  - TBD
- 3:45 pm Developing A Prudent Investment Policy



Tier 2



Tier 3



Quiet Money®



Tier 4

