

Financial  
Management  
Institute of Canada

**Financial  
Management for  
Employees  
Personal  
Development Day**

**April 15 2009**



For best practices related  
to the management of  
public sector resources

## Speakers



**Tim Patriquin**

Tim Patriquin is an Investment Advisor with RBC Dominion Securities, Canada's premiere wealth management service provider. Tim offers a comprehensive range of wealth management services, including financial planning, investment advice, insurance solutions and will and estate planning. Helping Tim provide you with comprehensive wealth management is an extensive team of professionals, including estate planners, insurance consultants, portfolio strategists and research analysts. Tim and his team understand the importance of building long lasting client relationships by creating winning strategies.

Prior to joining RBC Dominion Securities, Tim spent 23 years with the Canadian Forces as a Military Engineering Officer. His tours included six months in Croatia and seven months in Bosnia. He retired from the Canadian Forces in 2003 with the rank of Major. Tim then spent three years as Division Manager for an environmental technologies firm, responsible for markets in Canada, United States, Australia, New Zealand and Japan.

Tim has a Bachelor of Engineering (Civil) from the Royal Military College of Canada and an MBA from Queen's University.

Tim Patriquin's Presentation: Whether you are a new employee or contemplating retirement retire this professional development session is about you and your income. It will provide you with basic financial management information: Basics of Investing: How to start investing? Who Can Help? Personal budgeting: What am I worth? How do I decide on goals and objectives and make financial plan to achieve them? RSP Strategies and Retirement Planning; How to use tax savings, RESPs, and Spousal RSPs.



**John Kehoe**

John Kehoe is a Financial Planner with the Ontario Civil Service Credit Union and has been a financial advisor since 1995. Since joining the Credit Union in 2006 he has obtained his Certified Financial Planner designation, an internationally recognized designation indicating proficiency in areas such as investment, retirement, estate and tax planning. John is also a licensed mutual fund representative so he can provide advice on specific investment strategies.

John will be speaking about the specialized services offered by the Ontario Civil Service Credit Union, including investment, retirement and estate issues for members of the OPTrust and OPB pension plans. He will discuss key (sometimes little-known) features of these plans, how to build a retirement income around them, and how to consider them in light of current and future market volatility.

John will also provide information on estate planning, investing in volatile markets, and choosing a financial advisor.

FMI Ontario  
Financial Management for  
Employees  
Personal Development Day

The Ontario Chapter is holding a personal development day on **April 15th, 2009** on Financial Management for Employees.

To date FMI Ontario has organized eight professional development days, with topics ranging from Risk Management, Supply Chain Management, Corporate Governance and Accountability, Modernization of Financial Management to Asset Management and Controllershship. The Board of Directors recognizes that while it is important for its members to learn new skills and gain new insights for their professional development, it is equally important to learn and understand financial information that can be applied to personal development. That is why FMI Ontario is pleased to present "Financial Management for Employees". Two engaging speakers from the banking industry will share their wealth of knowledge about personal budgeting, investing, estate planning and retirement planning.

Birth, Marriage, Death and Taxes: Whether you are a new employee or contemplating retirement this professional development session is about you and your income. You will learn basic financial management information such as: The basics of investing: Who can help? Personal budgeting? What am I worth? How

do I decide on goals and objectives and make a financial plan to achieve them? How does my Pension work? RSP Strategies and Retirement Planning; How to use tax savings, RESPs, spousal RSPs; What are Elective Services, Supplementary Death Benefits, Retirement Benefits, Survivor Division Benefits...

FMI will be using a different format and type of topic for this conference. Instead of a Professional development day it will be focused on you or a personal development day.

The Conference is being held in Toronto at:  
Sam Sorbara Auditorium  
81 St. Mary Street  
St. Michael's College,  
University of Toronto

The day will be web cast to participants in the following locations:

St. Catharines  
Guelph  
Peterborough  
Sault Ste. Marie  
Sudbury

Web cast participants will be fully engaged in questioning presenters. Lunch and refreshments will be served and included in the price of your registration.

**April 15, 2009**

**Program**



- 8:15 am Registration, refreshments
- 9:00 am Welcome and Introductions
- 9:15 am **Tim Patriquin, Investment Advisor with RBC Dominion Securities**
- 10:30 am Break
- 10:50 am **Tim Patriquin, Investment Advisor with RBC Dominion Securities continued**
- 12:15 pm Lunch
- 1:15 pm **John Kehoe, Financial Planner, Ontario Civil Service Credit Union**
- 2:30 pm Break
- 2:50 pm **John Kehoe, Financial Planner, Ontario Civil Service Credit Union continued**
- 4:15 pm to 4:30 pm Closing remarks

**To register, click on [www.echapter.ca](http://www.echapter.ca) and go to FMI Ontario access page**