

# croesus — finnovation

2022 EDITION

TORONTO

September 16,  
2022



MONTRÉAL

October 13,  
2022



## ANNUAL WEALTH MANAGEMENT TECHNOLOGY CONFERENCE

*From Endeavour to Ingenuity* is the Finnovation 2022 theme.

Take advantage of new technologies and trends in wealth management to grow your business.

Join industry professionals to discuss issues and opportunities in our industry.

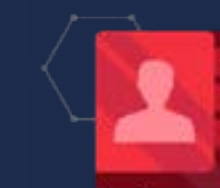
### Finnovation 2022 program

MONTRÉAL

11:30 am	Arrival of guests	
12:05 pm	Opening remarks	
12:15 pm	<b>Keynote luncheon</b> Charles Hamelin, short-track speed skater	
1:30 pm	Networking break	
2:00 pm	<b>Introduction to Croesus Advisor for nonusers</b> or <b>Croesus Advisor: Frequently asked questions for advanced users</b>	
2:45 pm	<b>The best is yet to come – Future developments in Croesus solutions (Part 1)</b>	
3:20 pm	<b>The Journey to De-Paper Wealth Management with Mako Fintech</b> Presentation by Mako Fintech	
3:45 pm	Networking break	
3:55 pm	<b>Financial advice delivery reimagined</b> Presentation by Conquest Planning	
4:20 pm	<b>Extend and enhance advisors' technology experience with Salesforce</b> Presentation by PSTOX and Soljit	
4:45 pm	<b>The best is yet to come – Future developments in Croesus solutions (Part 2)</b>	
5:00 pm	Closing remarks	
5:10 pm	Networking cocktail	
7:00 pm	End of Finnovation 2022	

0.5 Continuous Education (CE) credit accredited by IIROC

### Benefits of participating in Finnovation 2022



Networking with industry professionals



Discussions on industry trends



Discussions on new technologies



Access to Croesus experts



Frequently asked questions about Croesus Advisor



IIROC continuing education credits



### Who will participate?

- Wealth management professionals
- Investment advisors
- Portfolio managers

REGULAR

**\$249** + fees & taxes

until October 12, 2022

REGISTER NOW AT  
finnovation.croesus.com