



AGENDA – CONNECT 2026

Thursday June 11, 2026

8:00 – 9:00	Central Foyer	Registration & Breakfast
9:00 – 9:15	Britannia/Belaire/Mayfair	Welcoming Remarks
9:15 – 10:30	Britannia/Belaire/Mayfair	<u>How to incorporate AI into your everyday BV systems & processes</u> Rod Burkert – Burkert Valuation Advisors (AZ)
10:30 – 10:50	Central Foyer	Networking Break
10:50 – 11:50	Britannia/Belaire/Mayfair	<u>Global Trends and Their Impact on Business Valuation</u> Michael Dobner, National Leader of Economics & Policy Practice – PwC (Toronto) Mike Dutka, Director – PwC (Calgary)
11:50 – 12:50	Britannia/Belaire/Mayfair	Lunch
12:50 – 1:50	Britannia/Belaire/Mayfair	<u>Canada in the Global Energy System: Key Risks & Opportunities</u> Keynote - Robert Johnston, Director Energy and Natural Resources Policy - University of Calgary School of Public Policy
1:50 – 2:50 Breakout sessions	Britannia/Belaire/Mayfair	<u>Valuing Water Rights</u> Robert Telford, President – Telford Land & Valuation Inc. and McNally Land Services Ltd.(Calgary) Peter Ciechanowski, - Burnet Duckworth & Palmer LLP (Calgary)
	Lakeview Endrooms	<u>Courting Income: Family Law Cases on the Treatment of Income for Support</u> David Holmes, Managing Partner – RH Partners LLP (Barrie) Lorna Yates, Managing Partner – Laurel Family Law LLP (Toronto)
	Bonavista	<u>PE Strategies in the Current Environment</u> Jalal Jetha, Managing Director - Cascadia Equity Partners (Calgary)
2:50 – 3:10	Central Foyer	Networking Break Sponsored by 
3:10 – 4:10 Breakout sessions	Britannia/Belaire/Mayfair	<u>Oil and gas market trends - challenges and opportunities for the sector</u> Lesley Mitchell, Partner, Deloitte Resource Evaluation and Advisory - Calgary AB
	Bonavista	<u>Valuation in Volatile Markets: Fundamentals and Flexible Deal Structures</u> Mackenzie Regent, Managing Partner – Kalos LLP (Calgary) Kent Sweezey, Director – Kalos LLP (Calgary)
	Lakeview Endrooms	<u>Common Pitfalls and Risk Mitigation Strategies for Post-Transaction Disputes</u> Rohan Sethi, Partner, Forensic & Dispute Advisory Services & National Post-Acquisition Accounting Disputes Leader– KPMG LLP (Toronto) Michael Sisti, Manager, Forensic & Dispute Advisory Services – KPMG LLP (Toronto)
4:10 – 5:10	Britannia/Belaire/Mayfair	<u>The Future of Business Valuation: Global Standards, Regulatory Trust, and Professional Leadership</u> Nick Talbot, CEO – IVSC Catalina Miranda, Vice President Regulatory & Standards – CBV Institute
5:10 – 7:15	Grand Foyer	Cocktail Reception Sponsored by 

Friday June 12, 2026

7:45 - 8:30	Britannia/Belaire/ Mayfair	Breakfast
8:30 – 9:30	Britannia/Belaire/Mayfair	<u>Ethical Excellence in a Digital Era: CBVs, AI & Independent Judgment</u> Jennifer Lynch, President - Lynch & Associates Inc. (Toronto)
9:30 – 10:00	Central Foyer	Networking Break
10:00 – 11:00 Breakout sessions	Britannia/Belaire/Mayfair	<u>Valuation of Start-Up Entities: Valuation Theory and Investor Reality</u> Sean Smith, Partner, Strategy, Risk & Transactions Advisory – Deloitte (Ottawa) Jonathan Wolkin, Managing Director & VC - Deloitte Ventures
	Bonavista	<u>Demystifying Working Capital in Transactions</u> Kailin Sheremeta, Director – Kalos LLP (Calgary) Joseph Valencia, Associate Director – Kalos LLP (Calgary)
	Lakeview Endrooms	<u>Diamonds in the Rough – Elevating Your Report and Testimony for Counsel, Clients, and the Court</u> Louise Poole, Partner – Davis Martindale Roslyn M. Tsao, Managing Partner – Epstein Cole LLP (Toronto)
11:00 - 12:00 Breakout sessions	Britannia/Belaire/Mayfair	<u>The Evolving Deal Space in Indigenous Markets</u> Adam Van Elsberg, Senior Manager, Valuations & Litigation Support - MNP LLP (Calgary) Benjamin Cooper-Janvier, Senior Manager, Financial & Deal Advisory - MNP LLP (Calgary)
	Lakeview Endrooms	<u>Valuing Athletes: Earnings, Damages, and NIL</u> Aarij Wasti, Partner – Gowling WLG (Toronto/Qatar) Amran Nawaz, Associate Director - Secretariat (Dubai)
12:00 – 1:00	Britannia/Belaire/Mayfair	LUNCH
1:00 - 2:00	Britannia/Belaire/Mayfair	<u>Canadian and U.S Valuation Issues Focusing on Tax Implications</u> Debra Moses, National GES Tax Leader & Managing Director - RSM Canada (Montreal) Anne Bushman, Compensation & Benefits leader, RSM US LLP – RSM US (Washington)
2:00 - 3:00	Britannia/Belaire/Mayfair	<u>25 Years Later: Practical Solutions to Valuation Challenges Faced by All Valuators</u> Mark Weston, Practice Leader Valuation and Advisory – Davidson (Vancouver)

Save the Dates:

CONNECT 2027 – Toronto, ON – June 3 & 4

CONNECT 2028 – Charlottetown, PEI – June 8 & 9