

Thomson Reuters | 333 Bay Street, 29th Floor, Toronto | Tuesday, October 3, 2017 | 1:00 pm - 7:00 pm

## **Agenda**

1:00 pm	REGISTRATION & NETWORKING
4-20	Welcome and Opening Remarks
1:30 pm	Tom Corr, President and CEO, Ontario Centres of Excellence
4.05	Honoured Guest
1:35 pm	The Honourable Charles Sousa, Ontario Minister of Finance
1:45 pm	Creating Collisions: An Overview of FinTech Sandbox
	Jean Donnelly, Executive Director, FinTech Sandbox
	How FinTech Sandbox enables entrepreneurs to build their apps faster, better and more cost-effectively through streamlined access to a wide range of data
1:55 pm	FinTech Sandbox in Ontario
	Peter McFadzean, Manager, Partnerships, Ontario Centres of Excellence
	A guide to FinTech Sandbox for Ontario SMEs
2:00 pm	Keynote Speaker
	Mona Vernon, Chief Technology Officer, Thomson Reuters Labs
	Thomson Reuters has its roots in Ontario, and now it is boldly expanding here to take advantage of a diverse workforce and a thriving innovation ecosystem to provide world-class solutions to global customers. Mona will share her views on the importance of data and APIs in the fintech ecosystem.
	Case Studies – Data Partners & Fintechs
	Success stories happen when data providers and fintechs work together for their mutual benefit. Join us for indepth looks that make the qualitative and quantitative case for the FinTech Sandbox model.
2:20 pm	Holly Tishbey, API Program Manager, Yodlee
	Yodlee is an American software company that develops an account aggregation service that allows users to see their credit card, bank, investment, e-mail, travel rewards and other accounts on one screen.
2:30 pm	Brad Kotansky, Co-founder and CEO, Onist
	Onist is an integrated software platform that facilitates the collaboration between individuals and financial professionals including innovative financial management tools to better manage your family's wealth.



2:40 pm	Lawrence Johnson, Head of Fintech Engagement & SVP, Business Development,
	Morningstar
	Morningstar provides data and research insights on a wide range of investment offerings, including managed investment products, publicly-listed companies, private capital markets, and real-time global market data.
2:50 pm	Abraham Thomas, Chief Data Officer, Quandl     Quandl is a platform for financial, economic and alternative data that serves investment professionals by sourcing from over 500 publishers with all data accessible via an API.
3:00 pm	NETWORKING BREAK
3:15 pm	Panel – Keeping Up with Customers  The Revised Payment Services Directive (PSD2) takes effect in Europe next year. This is a major development that aims to make it easier and safer to use Internet payment services and promote the development and use of innovative mobile payment systems. As consumers continue to demand new and better ways to be served and more possibilities for cooperation between fintechs and traditional financial services emerge, what collective strategies and synergies should financial institutions, fintechs and regulators address here at home to compete globally and avoid a zero-sum game?
	<ul> <li>MODERATOR</li> <li>Oscar Roque, AVP, Mobile Product and Platform Development, Interac</li> </ul> PANEL
	<ul> <li>Win Bear, Managing Director, SVB Financial Group, Silicon Valley Bank</li> <li>Hamed Abbasi, CEO, Plooto</li> </ul>
	Andrew Graham, Co-founder and CEO, Borrowell
	Robert Kirwin, Co-founder and CEO, VigilantCS
3:55 pm	Keynote speaker
	Debbie Gamble, VP Digital Products and Platforms, Interac
	More open data from more sources can result in improved customer experience and choice as well as increasing transparency, and offering fintechs new opportunities. Why is this paradigm shift taking place, and what will it mean for Canadians and the Canadian banking system? How can organizations large or small embrace openness to create and capture value?
4:15 pm	Open Mic
	Fintechs and other participants have 30 seconds at the mic to pitch their product, data offering, barrier to entry, partnering need. The floor is yours, but you'll need to be brief!
4:45 pm	Closing Comments
	Peter McFadzean, Manager, Partnerships, Ontario Centres of Excellence
4:50 – 7:00 pm	NETWORKING RECEPTION SPONSORED BY MORNINGSTAR
	Reception Remarks
	Scott Mackenzie, President and CEO, Morningstar Canada