



**Small Dealers Symposium: Strategies for Success in the New Financial World  
Session Panelists and Moderator Overview**

Introduction: Ian Russell (IIAC)

Moderator: Bill Packham (Chair, IIAC Small Dealers / Introducing Firms Committee)

State of the Industry Session:

Ian Russell (IIAC)

Earl Bederman (Investor Economics)

Setting Your Firm up for Success Session (Parts 1 and 2):

Terry Bourne (Terry Bourne and Associates)

George Hartman (Market Logics Inc.)

Victor Toth (Insight Objects Inc.)

Strategic Transactions Session:

Milan Roy (Deloitte)

Kish Kapoor (Wellington West)

Neil Selfe (GMP)

Operational Considerations in Planning/Execution of a Strategic Transaction Session:

Laurie Clark (Smarten Up Institute)

Stan Deudney (Transatron Systems Inc.)

Canadian Counterpoint Session:

Kim Tillotson-Fleming (Hefren-Tillotson, Inc.)

Bill Pictor (Trubee, Collins & Co.)

David Williams (First Clearing Correspondent Services)

Closing Remarks: Susan Copland (IIAC)