

## **Steven Moscone - Navigating the Market Headlines at ASM19**

Chiraz: Hello and welcome to CDA Oasis, my name is Chiraz Guessaier. During this year's Ontario Dental Association annual meeting, CDSPI will hold a session that aims to help you navigate market headlines. Gathering a panel of investment professionals and financial planners dedicated to solely working with dentists, CDSPI's session will focus on helping you, the dentist, grow and meet your financial goals. One of the speakers is Steven Moscone, vice president of advisory services at CDSPI. He is here with me today to give us more details about the session and hopefully encourage you to attend. Steven, thank you for taking the time to speak with me today and welcome to this CDA Oasis conversation.

Steven: Good morning Chiraz. Pleasure to be here.

Chiraz: So, tell us more about the session and the panel of experts.

Steven: Of course, we've assembled, what we feel to be is an expert panel that will be talking about current trends and opportunities and competence. We will be discussing, the Canadian real estate market, US equities, international emerging markets, the blockchain. I'll also be doing an interview with someone from my leading company in Canada [inaudible] right now.

Chiraz: And why is this an important topic, but more importantly, why have you chosen to take the perspective of navigating headlines? Why are headlines important for dentists to take into consideration?

Steven: Great question. Investments are a fast-paced environment that are constantly in flux. It's important for dentists to stay on top of what's happening. Getting caught up in the noise, in order to grow and preserve their wealth.

Chiraz: And as I understand it during the session, you are introducing a new approach to the segment of financial planning. Can you give us a primer?

Steven: Yes, of course. We're actually doing an interactive quiz using text messaging. Dentists will be able to actually test their financial knowledge. We're going to have six advisors that reside in Ontario pose the questions along with two associates. [inaudible]

Chiraz: And your session is on Thursday. It is the first day of ASM, a very busy day at ASM. Why should dentists choose to attend your session versus any other concurrent session?

Steven: Sure. It's valuable information, it's current. Information on other markets, what's on the horizon, all the benefits. We'll have all the answers. Dentists who like to stay on top of things will find this session very interesting and beneficial.

- Chiraz: And I also saw in the description of your session in the ASM preliminary guide that you do encourage conversation asking questions and interaction during the session. If there was one piece of advice that will come out of this session that you would give to dentists, what would that be?
- Steven: Work with a certified financial planner, carve a long-term plan to achieve your financial goals. Clearly, you will be pulled in many different directions. Stick to a plan, you will actually be on course.
- Chiraz: Perfect. And for those who will not be able to attend ASM, where can they get more information?
- Steven: Of course, they're welcome to go to our website, log into our Insights Hub. They could actually call us as well, they would speak to a live advisor, who can actually direct them for the ODA conference itself, many different outlets. They're welcome.
- Chiraz: Perfect. And I'll make sure all that information is included in the post so people can get access to it easily. Steven, thank you very much once again for taking the time to speak with me today. I wish you all the best for the session and I hope to see you in Toronto.
- Steven: Thank you very much Chiraz.