



Advancing Standards™

February 25, 2025

2:00 PM ET

[Registration link](#)

*You will enter the meeting on mute. You may unmute your own line to provide your comments or ask questions. For those dialing in on the phone, please press *6 to unmute your line.*

Ottawa Update

Bruce Hartley,
Prospectus Associates

Tax Update

- Capital Gains Inclusion Rate Changes Postponed to January 2026

PMAC

Canadian Regulatory Updates

- [CSA Consultation on AI Systems in Capital Markets](#)
- [CSA Consultation on Data Portability](#)
- PMAC Advocacy Update: Submission to OSC Consultation on Long-Term Asset Funds

Victoria Paris, PMAC

Gavin Inkster, PMAC

International & Other Developments

- [Extension of Form PF Amendments Compliance Date](#)
- [Exemption from Exchange Act Rule 13f-2 and Related Form SHO](#)
- [US Department of Labor files motion to delay appeals of stay of fiduciary rule](#)

Warren Rudick, Manulife
Investment Management

Open Discussion

Members should raise questions/comments on issues relevant to PM firms

Warren Rudick, Manulife
Investment Management

Adjournment and Next Meeting:

- Tuesday, March 25, 2025 @ 2 PM ET

Warren Rudick, Manulife
Investment Management