

# EVENT SCHEDULE

## Day One: Tuesday, Nov. 19 (All times are in EST)

<b>11:00 AM</b>	<b>The New Factory Thinker 2030</b> Bill Bishop, <i>The BIG Idea Company</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
<b>12:00 PM</b>	<b>Break</b>		
<b>12:15 PM</b>	<b>Best Practices for Successful Practice Succession</b> Darrell Jacobsen & Johnathan Ciliberto, <i>Advisor Hunt</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
<b>1:15 PM</b>	<b>Break</b>		
<b>1:30 PM</b>	<b>Navigating the Healthcare Challenges in Canada</b> Deep Bajwa, <i>Best Doctors</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
<b>2:30 PM</b>	<b>Break</b>		
<b>2:45 PM</b>	<b>Affording Senior Living</b> Amanda Richards, <i>Chartwell Retirement Residences</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
<b>3:45 PM</b>	<b>Break</b>		
<b>11:30 AM</b>	<b>Understanding Assuris Protection</b> Adrien Bonhomme, <i>Assuris</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)

**Continuing Education Glossary**

*FP Canada Approved CE:*

FP - Financial Planning, PM - Practice Management, PK - Product Knowledge, PR - Professional Responsibility

*MFDA Approved CE:*

PD - Professional Development, BC Ethics - Business Conduct Ethics, BC - Business Conduct Other

# 2024 Virtual Fall Summit

NOV 19 & 20, 2024 | 11 AM - 5PM EST



## EVENT SCHEDULE

### Day Two: Wednesday, Nov. 20 (All times are in EST)

11:00 AM	<b>A White Sheet of Paper Approach for a Decade Full of Surprises</b> Jonathan Lo, <i>AGF Investments</i> on behalf of <i>Beneva</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
12:00 PM	<b>Break</b>		
12:15 PM	<b>Managing your E&amp;O Risk - Let's Talk Claims</b> Margaret Mede, <i>AXIS</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
1:15 PM	<b>Break</b>		
1:30 PM	<b>Navigating the Canadian Public/Private Healthcare Landscape</b> David Roberts, <i>Group Medical Services</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
2:30 PM	<b>Break</b>		
2:45 PM	<b>Why Advisors Need To Understand Pension Laws For Their Business Clients</b> Jean Pierre Laporte, <i>INTEGRIS Pension Management</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)
3:45 PM	<b>Break</b>		
4:00 PM	<b>What, Me Worry? Cybersecurity and the Independent Financial Professional</b> Roberta Tasson, <i>Magnes Group</i>		1 Life (ON,SK) 1 Life/A&S (BC, MB) 1 AIC (Pending) 1 FP Canada (Pending) 1 MFDA (Pending)

#### Continuing Education Glossary

*FP Canada Approved CE:*

FP - Financial Planning, PM - Practice Management, PK - Product Knowledge, PR - Professional Responsibility

*MFDA Approved CE:*

PD - Professional Development, BC Ethics - Business Conduct Ethics, BC - Business Conduct Other