2025 Virtual Spring Summit

MAY 7 & 8, 2025

IFB CISF

EVENT SCHEDULE

Day One: Wednesday, May 7

(ALL TIMES ARE IN EDT)

11:00 AM	**New Factory Thinking: Innovating Financial Advisory for Growth and Success** Bill Bishop, The BIG Idea Company	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life (AB) 1.00 FP Canada: PM (Pending) 1.00 MFDA: PD (Pending)
12:00 PM	**Break**	
12:15 PM	**Protecting Canadian Policyholders with Assuris** Adrien Bonhomme and Stephanie Greer, Assuris	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life, A&S (AB) 1.00 FP Canada: FP 1.00 MFDA: PD
1:15 PM	**Break**	
1:30 PM	**Global Medical Care - Empowering healthcare for Canadians** Rohit Sharma, *Best Doctors*	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life, A&S (AB) 1.00 FP Canada: PK (Pending) 1.00 MFDA: PD (Pending)
2:30 PM	**Break**	
2:45 PM	**Navigating Senior Living Conversations with Senior Clients and Families** Amanda Richards, Chartwell Retirement Residences	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life (AB) 1.00 FP Canada: FP (Pending) 1.00 MFDA: PD (Pending)
3:45 PM	**Break**	
4:00 PM	**Understanding GICs: Secure Fixed Income Investments for Growing Your Clients' Savings** Sheldon Solomon, HomeTrust	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life (AB) 1.00 FP Canada: PK (Pending) 1.00 MFDA: PD (Pending)

EVENT SCHEDULE

Day Two: Thursday, May 8

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11:00 AM	**How to Create a Retirement Income Plan** Paul Grunsell, Beneva	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life (AB) 1.00 FP Canada: FP (Pending) 1.00 MFDA: PD (Pending)
12:00 PM	**Break**	
12:15 PM	**Structuring Succession for Success** Tyler Wilson, Care Lending Group	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life, A&S, General (AB) 1.00 FP Canada: PM (Pending) 1.00 MFDA: PD (Pending)
1:15 PM	**Break**	
1:30 PM	**Dealing with Incapacity as a Wealth Advisor** Paul Taylor, Borden Ladner Gervais	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life, A&S (AB) 1.00 FP Canada: FP (Pending) 1.00 MFDA: BC- Ethics (Pending)
2:30 PM	**Break**	
2:45 PM	**How AI can streamline operations and ensure a steady flow of new clients** Dave Faulkner, Evad AI	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life, General (AB) 1.00 FP Canada: PM (Pending) 1.00 MFDA: PD (Pending)
3:45 PM		
4:00 PM	**Understanding E&O Claims: What Every Financial Professional Needs to Know** Margaret Mede & Amanda Calder, Axis	1.00 Life (ON,SK) 1.00 Life/A&S (BC,MB) 1.00 Life, A&S, General (AB) 1.00 FP Canada: PM (Pending) 1.00 MFDA: BC (Pending)

Continuing Education Glossary
FP Canada Approved CE: Financial Planning (FP), Practice Management (PM), Product Knowledge (PK)
MFDA Approved CE: Professional Development (PD), Business Conduct Other (BC), Business Conduct Ethics - BC Ethics , AIC - Alberta Insurance Council

Schedule subject to change.