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September 22nd 2016 - TCU Place, Saskatoon's Arts & Convention Centre, Saskatoon SK

Gallery B							
8:30 a.m. - 9:30 a.m.	<p>Changes and Challenges in Saskatchewan's Insurance Industry 2016 <i>Ron Fullan and April Stadnek, Insurance Councils of Saskatchewan</i> (FPSC: Practice Management)</p> 						
9:30 a.m. - 9:45 a.m. Break							
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9:45 a.m. - 10:45 a.m.							
11:00 a.m. - 12:00 p.m.							
12:00 p.m. - 1:00 p.m.	Buffet Networking Lunch						
1:00 p.m. - 2:00 p.m.	<p>Update on Professional Liability Cases in 2015 and Practical Steps to Avoid Claims by Clients <i>Cecilia Hoover, Dolden Wallace Follick LLP</i> (FPSC: Practice Management)</p> 						
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IFB 2016 Saskatoon Regional Event Presentations



Beyond Protection

David Talbot, Foresters Life of Canada

(FPSC: Product)



Learn about the unique and complimentary benefits that come with holding a Foresters Financial policy. In some cases these can amount to over \$500,000 of additional benefit at no extra cost. Looking for a new way to generate referrals? Learn about orphan benefits and how they can help you grow your business. Partner with Foresters and learn how you can truly deliver the difference to your clients and your business. Learn about the unique policy features such as smokers being charged non-smoker rates and free convertible term insurance for children even those who are uninsurable.

More for your client, More for you

Chantal Mackenzie, Canada Protection Plan

(FPSC: Product)



We will provide an overview of the current opportunities in the life insurance industry for our “no medical insurance”, as well as specifically where our products and new enhancements will provide affordable and easy to understand solutions for your clients.

Additionally, we will demonstrate our illustration software and review some case studies to help better visualize where we can help your clients as well as improve your current business case flow.

Changes and Challenges in Saskatchewan's Insurance Industry 2016

Ron Fullan and April Stadnek, Insurance Councils of Saskatchewan

(FPSC: Practice Management)



The Insurance Councils of Saskatchewan will present brokers with updates on the Life Insurance Council, as well as an update on compliance and trends. The Life Insurance Council update portion of the presentation will cover Bill 177 – the new Saskatchewan Insurance Act, and an update on the harmonized LLQP Program which was launched January 1, 2016. The compliance and trends segment of the seminar will focus on Council's new Code of Conduct, which is designed to help licensees and consumers have a more detailed understanding of conduct expectations in the life insurance industry.

Acquiring more ideal clients by building an ideal client experience process

Grant Hicks, Advisor Practice Management

(FPSC: Practice Management)



Advisor Practice Management is presenting a new way to look at your practice that focuses on the current market trends such as robo-advising and transparency. The take away for advisors are four key practice management strategies to implement to grow their revenue and time including client feedback value, client value proposition, ideal client metrics and ideal client attraction.

Know More Sell More

Karine Orser, ivari

(FPSC: Product)



ivari will show you how its products offer your middle market clients new concepts that will benefit your client while providing complete coverage. Through the use of unique Term 30 options, a CI Rider that is extremely cost effective or the Universal Life product, we will show you concepts that focus on the average Canadian to help them create better tomorrows!

Planned Giving

Tim Briand, Wawanesa Life Insurance Company

(FPSC: Financial Planning)



This presentation will cover: why people choose to donate, the structure of charitable operations, charitable giving tax structure, levels of control afforded to the donor when donating life insurance, situations where life insurance can be used to aid in charitable giving, back to back arrangements, split dollar charitable arrangements and charity tax schemes that the CRA are catching on to.

A Retirement Income Strategy

Jody Ford, Equitable Life of Canada

(FPSC: Financial Planning)



This presentation reviews the many factors that impact retirement income planning facing Canadians today. These include demographics, financial and market risk variables. There are several retirement income solutions in the marketplace and these are evaluated based on client needs and plans. This case study illustrates how guaranteed retirement income solutions can help clients meet their income needs and provide options for future income requirements as well as Estate Planning opportunities for the next generation.

Update on Professional Liability Cases in 2015 and Practical Steps to Avoid Claims by Clients

Cecilia Hoover, Dolden Wallace Folick LLP

(FPSC: Practice Management)



Please join us for a discussion outlining the claims process from the perspectives of the defense and prosecuting lawyers. Cecilia will review several recent cases and will identify what the advisor could have done differently that might have avoided liability in those cases.

How Can I Protect Myself from an E&O Lawsuit?

Roberta Tasson, The Magnes Group

(FPSC: Financial Planning)



Many brokers think that E&O claims are something that only ever happen to other people. And, while the majority of agents will go through an entire career without a claim, many well-intentioned and responsible brokers are surprised when the unthinkable happens to them. This session will provide you with insights into some common areas in which claims arise, and some simple good habits that will help prevent problems, and that will also strengthen your position before the courts should an incident ever lead to a claim against you.

How to fund your business's growth; Taking the mystery out of borrowing money!

Julia Haggerty, CWB Maxium Financial

(FPSC: Financial Planning)



Growing a business costs money. To cover these costs, business owners can either save over time, or they can borrow the funds to accelerate growth. As much as Financial Advisors understand money and investments, as a service business in a niche market, they face particular challenges in borrowing money. These challenges can seem daunting if not mysterious! In this session, understand:

- What lenders look for in a borrower, and how to put your best foot forward
- Why Financial Advisor businesses can be challenged to meet these expectations
- What a Financial Advisor should look for in a lender
- Where to find a lender that understands your business
- How to prepare your business for a loan so that you maximize your chance of a loan approval at the best rate possible!