

## IFB Winnipeg Event

September 20th, 2016 - Victoria Inn Hotel & Convention Centre, Winnipeg MB

Embassy C, D, E	
8:00 a.m. - 9:00 a.m.	<b>Travel Without Worry</b> <i>Barry Guttormson, HotWinters.ca- Travel Medical Insurance</i> (FPSC: Product) 
9:10 a.m. - 10:10 a.m.	<b>Know More Sell More</b> <i>Anna Winkfein, ivari</i> (FPSC: Product) 
10:10 a.m. - 10:30 a.m.	<b>Break</b>
10:30 a.m. - 11:30 a.m.	<b>Acquiring more ideal clients by building an ideal client experience process</b> <i>Grant Hicks, Advisor Practice Management</i> (FPSC: Practice Management) 
11:40 a.m. - 12:40 p.m.	<b>A Retirement Income Strategy</b> <i>Adrian Boyko, Equitable Life of Canada</i> (FPSC: Financial Planning) 
12:40 p.m. - 1:30 p.m.	<b>Lunch</b>
1:30 p.m. - 2:30 p.m.	<b>How to fund your business's growth; Taking the mystery out of borrowing money!</b> <i>Julia Haggerty, CWB Maxium Financial</i> (FPSC: Financial Planning) 
2:40 p.m. - 3:40 p.m.	<b>More for your client, More for you</b> <i>Chantal Mackenzie, Canada Protection Plan</i> (FPSC: Product) 
3:40 p.m. - 4:00 p.m.	<b>Break/Draw Prize Winners</b>
4:00 p.m. - 5:00 p.m.	<b>Common Reasons for Disciplinary Action (Presented by ICM)</b> <i>Lee Roth, Investigator at the Insurance Council of Manitoba</i> (FPSC: Practice Management) 

# IFB 2016 Winnipeg Educational Event Presentations



## **Travel Without Worry**

*Barry Guttormson, HotWinters.ca- Travel Medical Insurance*

**(FPSC: Product)**

ID# 27064



Many active retirees travel regularly. Snowbirds and Winter Texans often spend up to six months in the south, typically in the USA where healthcare is the most expensive. A single medical emergency can wipe out most people's retirement funds. Ensure your clients and your assets under management are protected by travel insurance.

This topic will cover examples of why insurance is necessary, medical underwriting and application traps. Ideas will be shared on how to reduce premiums, ensure medical stability matches policy requirements and it will contrast group and individual plans.

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

*Julia Haggerty, CWB Maxium Financial*

**(FPSC: Financial Planning)**

ID # 27062



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!

## **Know More Sell More**

*Anna Winkfein, ivari*

**(FPSC: Product)**

ID# 27065



*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!

### **More for your client, More for you**

*Chantal Mackenzie, Canada Protection Plan*

**(FPSC: Product)**

ID #27061



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.

### **Acquiring more ideal clients by building an ideal client experience process**

*Grant Hicks, Advisor Practice Management*

**(FPSC: Practice Management)**

ID#: 27066



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.

### **A Retirement Income Strategy**

*Adrian Boyko, Equitable Life of Canada*

**(FPSC: Financial Planning)**

ID# 27063



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.

**Common Reasons for Disciplinary Action (Presented by ICM)**

*Lee Roth, Investigator at the Insurance Council of Manitoba*

**(FPSC: Practice Management)**

ID# 24584



Lee Roth, Investigator, Insurance Council of Manitoba (“Council”), who has held the position of Investigator since 2011, will be presenting “Common Reasons for Disciplinary Action”. This presentation has been designed to offer insight into Council’s concerns so that Life and Accident and Sickness agents/brokers may operate a more compliant practice.