2019 Alberta Spring Summit

May 16 2019 - Best Western Premier Calgary Plaza Hotel – *formerly known as the Coast Plaza Hotel and Conference Centre*

*Schedule subject to change

	Plaza Two
7:30 a.m. - 8:00 a.m.	Registration and Coffee
8:00 a.m. - 9:15 a.m.	**Update from the Canadian Insurance Services Regulatory Organizations (CISRO)** *Ron Fullan, Chair of CISRO and Executive Director, Insurance Councils of Saskatchewan* AAC ID# 51255, 1.25 Life, 1.25 A&S, 1.25 General FP Canada CE Approved: Practice Management 1.25 Approved CE FP Canada
9:15 a.m. - 9:30 a.m.	**Coffee & Networking Break**
9:30 a.m. - 10:45 a.m.	**Character and Professional Relationships** *Rod Burylo, Business Development Manager, Croft Financial Group* AAC ID# 51256, 1.25 Life, 1.25 A&S, 1.25 General FP Canada CE Approved: Professional Responsibility 1 Approved CE FP Canada
10:45 a.m. - 11:00 a.m.	**Networking Break**
11:00 a.m.- 12:15 p.m.	**The Social Science of Advisor and Broker Succession** *Roland Chan, Founder & CEO of FindBob* AAC ID# 51253, 1.25 Life, 1.25 A&S, 1.25 General FP Canada CE Approved: Practice Management 1.25 Approved CE FP Canada
12:15 p.m. - 1:00 p.m.	**Buffet Lunch**
1:00 p.m. - 2:15 p.m.	**Insurance for Privacy and Network Security Breaches** *Roberta Tasson, The Magnes Group* AAC ID# 51257, 1.25 Life, 1.25 A&S, 1.25 General FP Canada CE Approved: Practice Management 1.25 Approved CE FP Canada
2:15 p.m.- 2:30 p.m.	**Networking Break**
2:30 p.m. - 3:45 p.m.	**Advisor Bionics, the Future of Financial Advice** *Dave Faulkner, Razor Logic Systems Inc.* AAC ID# 51252, 1.25 Life, 1.25 A&S FP Canada CE Approved: Practice Management 1.25 Approved CE FP Canada
3:45 p.m. - 4:00 p.m.	**Coffee & Networking Break**
4:00 p.m. - 5:15 p.m.	**Benefits Boot Camp** *David Roberts, Group Medical Services* AAC ID# 51532, 1.25 Life, 1.25 A&S FP Canada CE Approved: Pracice Management 1.25 Approved CE FP Canada

IFB 2019 Alberta Summit Presentationss

Benefits Boot Camp
David Roberts, Group Medical Services
AAC ID# 51532, 1.25 Life, 1.25 A&S
FP Canada CE Approved: Pending

Advisors who are presenting life, health and dental group benefits in front of clients need to understand the just the components of a plan, but how those plan features work. While it's sometimes tempting to do a strict 'apples to apples' comparison of plans, the lowest rate isn't always the best option for the client. This Boot Camp provides the basics for those considering adding group benefits to their product offerings. It also looks at the impact of digital disruptors on the financial services world, and how that impacts group benefits.

Update from the Canadian Insurance Services Regulatory Organizations (CISRO)
Ron Fullan, Chair of CISRO and Executive Director, Insurance Councils of Saskatchewan
AAC ID# 51255, 1.25 Life, 1.25 A&S, 1.25 General
FP Canada CE Approved: Practice Management, 1.25

The Canadian Insurance Services Regulatory Organizations is an inter jurisdictional group of regulating authorities who are dedicated to developing consistent standards of qualifications and practice for insurance intermediaries dealing in insurance of persons and property. Its goals and objectives include creating a common voice to deal with issues that may be of interest to other financial services regulators, consumers and intermediaries. As Chair of CISRO, Ron Fullan will update attendees on CISRO's priorities and initiatives, including the Fair Treatment of Customers Guidance Document (FTC). He'll also provide a brief overview of changes to the Saskatchewan Insurance Act for those who are licensed in both Alberta and Saskatchewan.

Character and Professional Relationships
Rod Burylo, Business Development Manager, Croft Financial Group
AAC ID# 51256, 1.25 Life, 1.25 A&S, 1.25 General
FP Canada CE Approved: Professional Responsibility, 1.00

This course introduces Financial Advisors to the most important concepts and issues related to character, professional relationships and ethics in the financial services industry. This seminar is provided by financial services author, educator, and ethics specialist, Rod Burylo.

Insurance for Privacy and Network Security Breaches
Roberta Tasson, The Magnes Group
AAC ID# 51257, 1.25 Life, 1.25 A&S, 1.25 General
FP Canada CE Approved: Practice Management, 1.25

It was recently said that there are only two types of businesses: those that have been hacked, and those that will be. That statement applies to all businesses (including yours) – not just corporations – and as advisors, none of us are immune. Privacy and Network security breaches aren't just caused by cybercriminals. Just as often, they are the result of human error, software glitches, or the loss or theft of files. Join Roberta for this eye-opening presentation in which she'll walk you through the exposures all advisors face, privacy law in Canada, and the available coverage for this risk.

Advisor Bionics, the Future of Financial Advicee
Dave Faulkner, Razor Logic Systems Inc.
AAC ID# 51252, 1.25 Life, 1.25 A&SS
FP Canada CE Approved: Practice Management, 1.25

According to the recent C.D. Howe study, "Next-Gen Financial Advice", the financial industry is dealing with a looming perfect storm – fee compression, shifting demographics, unrelenting regulatory changes and an erosion in the number of human advisors.

In this presentation, you will learn how financial advisors will collaborate with current and emerging technologies in the future to create holistic advice, provide full transparency and add greater value compared to direct-to-consumer technologies.

The Social Science of Advisor and Broker Succession
Roland Chan, Founder & CEO of Findbob
AAC ID# 51253, 1.25 Life, 1.25 A&S, 1.25 General
FP Canada CE Approved: Practice Management, 1.25

We know we have an advisor and broker succession problem, yet why haven't we made progress in this area as an industry?". As an advisor, sales manager, agency owner, or home office leader, you have undoubtedly asked yourself this question. No matter how many blog posts by experts you read, colleagues you talk with, processes you deploy, it never feels like there's an easy answer. That's because it is difficult. In order to make progress and create processes that will actually be taken advantage of, we have to really understand the advisor/agent. In this presentation, we'll examine the social science around how people make decisions and apply this to advisor/agent succession. Lastly, we'll share how the IFB is assisting in this are via ComingUpNext.