IFB Saskatoon Financial Advisor Forum

September 26 2018- TCU Place, Saskatoon's Arts & Convention Centre, Saskatoon SK

	Gallery B
8:00 a.m. - 9:00 a.m.	**January 1, 2019 – Will You Know How To Act?** *Ron Fullan and April Stadnek, Insurance Councils of Saskatchewan* FPSC: Practice Management
9:00 a.m. - 9:10 a.m.	**Break**
9:10 a.m. - 9:50 a.m.	**How to Find and Acquire More Ideal Clients Using Fee Audits** *Grant Hicks, Advisor Practice Management* FPSC: Practice Management
10:00 a.m. - 10:40 a.m.	**Underwriting Heart & Stroke** *Chantal Mackenzie, Canada Protection Plan* FPSC: Product
10:50 a.m. - 11:30 p.m.	**GIC Laddering - Minimize the risk, Maximize the reward** *Michael Martino, Home Trust Company* FPSC: Product IIROC: 1.00- Professional Development
11:40 a.m.- 12:20 p.m.	**Active Management for Independent Thinkers** *Craig Millar, NCM Investments* FPSC: Pending
12:20 p.m. - 1:00 p.m.	**Buffet Networking Lunch**
1:00 p.m.- 1:40 p.m.	**The Inspirational Tipping Point** *Simon Reilly, Leading Advisor* FPSC: Practice Management
1:50 p.m. - 2:30 p.m.	**Build Your Business with R.O.C.** *Darren Golka, Experior Financial* FPSC: Financial Planning
2:30 p.m.- 2:40p.m.	**Break**
2:40 p.m. - 3:20 p.m.	**Have you considered adding US Small Cap to your portfolio?** *Johnny Quigley, SSQ Insurance* FPSC: Product
3:20 p.m. - 3: 30 p.m.	**Draw Prize Winners**
3:30 p.m. - 4:10 p.m.	**Growing Demands in the Visitors to Canada Insurance Market** *Kristina van der Wal, Travelance* FPSC: Product

IFB 2018 Saskatoon Event Presentations

January 1, 2019 – Will You Know How To Act?
Ron Fullan and April Stadnek, Insurance Councils of Saskatchewan
FPSC: Practice Management

The Insurance Councils of Saskatchewan will present brokers with changes in the new Saskatchewan Insurance Act that will affect the Life Insurance Industry as well as an update on Actions of licensees that lead to compliance Actions.

Active Management for Independent Thinkers
Craig Millar, NCM Investments
FPSC: Pending

For over 20 years, NCM Investments has been providing advisors with an independent choice in wealth management solutions. From our award-winning mutual funds, to the industry's first flat management fee mutual fund series, NCM is focused on delivering exceptional long-term performance, and being a trusted partner to our clients. Join us for a discussion on where we see wealth creation opportunities globally, and how we translate this into innovative solutions to create and preserve wealth using a highly disciplined and repeatable approach to investing.

How to find and acquire more ideal clients using fee audits
Grant Hicks, Advisor Practice Management
FPSC: Practice Management

Financial advisors looking to acquire more ideal clients, can help prospects understand what they are paying and more importantly what they are getting. How do you feel when you are paying for something and not getting it? Learn how fee audits and beneficiary audits can grow your practice.

Have you considered adding US Small Cap to your portfolio?
Johnny Quigley, SSQ Insurance
FPSC: Product

Most Canadian investors, when investing in the US Equity market, neglect to take into consideration US Small Cap securities for their US Portfolio. This presentation will go over the logic and impact of adding US Small Cap securities and how the SSQ Hillsdale U.S. Equity Fund takes advantage of this asset class and offers the best of both worlds (US Large Cap vs. US Small Cap).

Underwriting Heart & Stroke
Chantal Mackenzie, Canada Protection Plan
FPSC: Product

One of the leading causes of death in Canada, Heart Disease and Stroke affects thousands of Canadians each year. How do these medical conditions occur and how does it affect the way you write life insurance? Please join Canada Protection Plan as we profile the way Heart Disease and Stroke is traditionally underwritten and how it compares with Canada Protection Plan's simplified approach. Learn how your clients with a history of Heart Disease and Stroke can receive fast, affordable, and simple coverage with NO MEDICAL required. Case studies included!

GIC Laddering - Minimize the risk, Maximize the reward
Michael Martino, Home Trust Company
FPSC: Product
IIROC: 1.00- Professional Development

Maximize your GIC returns while protecting your clients against interest rate fluctuations by using the proven strategy of GIC laddering. This investment strategy will allow you to efficiently maximize the performance of your GIC portfolio while minimizing the risk. In addition, GIC laddering provides your clients with convenient access to a portion of their GIC portfolio every year.

The Inspirational Tipping Point
Simon Reilly, Leading Advisor
FPSC: Practice Management

Would it be worth investing 60 minutes of your time to understand how to create more sales, focused action and a bigger vision & plan, and save you decades of struggle? You are a successful Financial Services Professional that is passionate about helping your clients to create a plan to grow assets, protect assets, save tax and leave a lifelong legacy. At the same time, you are creating a career of significance, becoming the best, passionate version of yourself. While you know exactly HOW & WHAT to do, you experience challenges with balance, complacency, delegation, fear, procrastination, qualification, rejection, stress, time and overwhelm, all of which crowd out action, confidence, commitment, consistency, energy, focus, inspiration, practices, production and vision. You are ready to increase your understanding; success is 10% about HOW & WHAT to do and 90% of success is about WHY you do what you do. You are ready to understand that there is nothing wrong; only an absence of understanding

Growing Demands in the Visitors to Canada Insurance Market
Kristina van der Wal – Travelance
FPSC: Product

The demand for Visitors to Canada Emergency Medical Insurance is on the rise! Learn about the growing demands in the Visitors to Canada insurance market in this information-packed session. This presentation will review the various reasons visitors come to Canada, the visas and permits they use, how we can provide these visitors with protection against unexpected emergencies, along with how to market to this growing segment.

Build Your Business with R.O.C.
Darren Golka, Experior Financial
FPSC: Financial Planning

Jamie will be covering many different ways to obtain referrals from clients and one of the best ways is by giving a holistic approach to your financial advising of a consumer rather than just selling life insurance or one particular product. In addition Jamie will be discussing the ownership opportunities that exist in the industry and why it is important to plan long-term for your business and your succession plan. And finally Jamie will be covering his favorite word, consistency. And how many of the most successful people in this business are not necessarily those that exceed to the highest levels in a single day or week or month or even a year but rather those who are consistent over the lifetime of their career and their prospecting activities. It's a true example of The Tortoise and the Hare.