IFB Winnipeg Event- May 16, 2018

8:00 a.m. - Morning Program

The Future of Independent Advice
Sheldon Stier, Director, IFB
ID# 30239
(FPSC: Practice Management) .5

Help Your Clients Make the Right Tax Moves
Evelyn Jacks, Knowledge Bureau
ID# 30187
(FPSC: Financial Planning) 1

The Private Client Advantage
Gerry Bettig, Antares Investment Management
ID# 30229
(FPSC: Product) 1

Helping you sell Par Whole Life
Jody Ford, Equitable Life
ID# 30190
(FPSC: Product) 1

Protect Yourself from an E&O Lawsuit
Roberta Tasson, The Magnes Group
ID# 30191
(FPSC: Practice Management) 1

12:15 p.m. – 12:45 p.m. – Lunch

12:45 p.m. – Afternoon Program

Super Visa VTC (Visitors to Canada) Emergency Medical Insurance
Phoebe Haroun, Travelance
ID# 30189
(FPSC: Product) 1

No job is too big, no company is too small for Fiera Capital's small cap strategy
Michael Chan, Vice President and Senior Portfolio Manager at Canadian Small Cap Equity Core Sponsored by SSQ Insurance
ID# 30251
(FPSC: Product) 1

Using Technology to Find a Teammate: Advisor Teaming as an Antidote to the Perpetuation Problem
Roland Chan, FindBob
ID# 30185
(FPSC: Practice Management) 1.5

3:45 p.m. – Wrap up and Closing Remarks

IFB 2018 Winnipeg Event Presentations

No job is too big, no company is too small for Fiera Capital's small cap strategy
Michael Chan, Vice President and Senior Portfolio Manager at Canadian Small Cap Equity Core
Sponsored by SSQ Insurance
ID# 30251
FPSC: Product

Finding the next blue chips in Canada, this is what the Fiera Capital Small cap strategy is all about. We believe that our philosophical approach of building a portfolio stock-by stock, employing a research focused, bottom-up approach is the best method for building a portfolio that will outperform the market over the long term. We focus on companies with significant competitive advantages and superior return on equity and growth relative to industry peers. Finally we purchase companies at a discount to fair value based on our 3-year outlook.

The Future of Independent Advice
Sheldon Stier, Director, IFB
ID# 30239
FPSC: Practice Management, 0.50

As you work away helping your clients make investment and insurance decisions and plan for a more secure future, the industry you work in is on the cusp of radical change. Everything from how you are paid, to technological innovations, to demographics are pressuring today's way of doing business. What's on the horizon for you and your clients?

The Private Client Advantage
Gerry Bettig, Antares Investment Management
ID# 30229
FPSC: Product

We believe that investors benefit significantly when they work with two professionals who are on their side: the financial planner and the portfolio manager. Personal portfolio management can help reduce complexity, and provide greater peace of mind for both you and your clients. Learn how the Private Client Advantage can help you and your business.

Help Your Clients Make the Right Tax Moves
Evelyn Jacks, The Knowledge Bureau
ID# 30187
FPSC: Financial Planning

Tax reforms have been dominating the news recently and a lot has changed – for individuals, families, students, investors, retirees and business owners. Some rethinking is required by advisors and their clients: what is the impact of taxes and inflation on investment and retirement planning and family wealth management. Further, a big new issue, is the aggressive and punitive tax audit environment Canadians find themselves in. There is tremendous opportunity for professionals to provide invaluable advice. Evelyn Jacks will provide more information in this thought-provoking session.

Super Visa VTC (Visitors to Canada) Emergency Medical Insurance
Phoebe Haroun, Travelance
ID# 30189
FPSC: Product

This presentation will focus on:

- Visitors to Canada
- Super Visa
- Requirements to Qualify for a Super Visa
- Visitors to Canada Emergency Medical Insurance
- Eligibility, Benefits, Pre-Existing Conditions, Administration, Cost
- Why Travelance Plans
- How to Promote These Plans

Helping you sell Par Whole Life
Jody Ford, Equitable Life
ID# 30190
FPSC: Product

This presentation will take a look at the differences between Whole Life, Universal Life and Term products and helps breakdown how to position the product to your clients.

Protect Yourself from an E&O Lawsuit
Roberta Tasson, The Magnes Group
ID# 30191
FPSC: Practice Management

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.

Using Technology to Find a Teammate: Advisor Teaming as an Antidote to the Perpetuation Problem
Roland Chan, FindBob
ID# 30185
FPSC: Practice Management

Roland Chan, CEO of FindBob and the architect of Coming Up Next, IFB's own advisor continuity and succession planning program, will offer insights into the benefits of advisor teaming. He will share industry research that suggests that:

- Individuals who work in teams earn more revenue
- Teams retain more clients through better customer experience
- Teams do a better job retaining assets during a wealth transfer, and
- Lastly, how teaming can answer the succession crisis

Find out how advisors can use online applications, like Coming Up Next, to connect with other financial professionals and kick start their advisor teaming goals.