





IFB Winnipeg Event

September 24 2019- Victoria Inn Hotel & Convention Centre

Wellington A	
8:30 a.m. - 9:30 a.m.	<p>The Reports of My Death Are Greatly Exaggerated <i>David Onyett-Jeffries, Guardian Capital LP</i> ID# 32895 FP Canada Approved CE: Product, 1.00</p> <p>1  Approved CE FP Canada</p>
9:30 a.m.- 9:45 a.m.	Break
9:45 a.m. - 10:45 a.m.	<p>Insurance for Privacy and Network Security Breaches <i>Roberta Tasson, The Magnes Group</i> ID# 33002 FP Canada Approved CE: Practice Management, 1.00</p> <p>1  Approved CE FP Canada</p>
10:45 a.m.- 11:00 a.m.	Break
11:00 a.m. - 12:00 p.m.	<p>Digital Solutions for a Digital Age <i>James O'Connell, HUMANIA Assurance Inc.</i> ID# 32896 FP Canada Approved CE: Product, 1.00</p> <p>1  Approved CE FP Canada</p>
12:00 p.m. - 12:30 p.m.	Buffet Networking Lunch
12:30 p.m.- 1:30 p.m.	<p>Trends in Financial Planning <i>Herp Lamba, Senior Vice-President, Financial Services, IG Wealth Management Inc.</i> ID# 33017 FP Canada Approved CE: Pending</p>
1:30 p.m.- 1:45p.m.	Break
1:45 p.m. - 2:45 p.m.	<p>Back to The Future <i>George Sigurdson, Customplan Financial Advisors Inc.</i> ID# 33018 FP Canada Approved CE: Pending</p>
2:45 p.m.- 3:00p.m.	Break
3:00 p.m. - 4:00 p.m.	<p>Engaging Executors Crucial to the Greatest Wealth Transfers in History <i>Mark O'Farrell, President, the Canadian Institute of Certified Executor Advisors (CICEA)</i> ID# 32898 FP Canada Approved CE: Practice Management 1.00</p> <p>1  Approved CE FP Canada</p>

The Reports of My Death Are Greatly Exaggerated

David Onyett-Jeffries, Vice President, Multi Asset Class Solution, Guardian Capital LP

Keynote speaker sponsored by SSQ Insurance

ID# 32895

FP Canada Approved CE: Product, 1.00

In stark contrast to the beginning of last year, sentiment in financial markets is quite downbeat heading as investors seemingly are gearing up for the worst. Yet lowered expectations mean that there is scope for the balance of risks to skew to the upside. And while there is a growing magnitude of concerns, and the narrative is to the contrary, the underlying macro backdrop still remains constructive and the coming year is looking as though it will again record broad-based and above-trend (though more moderate) growth. Against this backdrop, corporate earnings are likely to continue to expand which should underpin risk asset performance — however, heightened uncertainty in the market environment and the high probability that volatility persists means that the approach to investing should focus on managing risk exposures and strategies that are better able to perform against a more uncertain market backdrop.

Digital Solutions for a Digital Age

James O'Connell, Humania Assurance

ID# 32896

FP Canada Approved CE: Product, 1.00

Humania Assurance – your technologically advanced carrier! Humania is the whole package for your online insurance needs. Let's unwrap the digital offerings that can help you protect your clients fast and efficiently.

Engaging Executors Crucial to the Greatest Wealth Transfers in History

Mark O'Farrell, President, the Canadian Institute of Certified Executor Advisors (CICEA)

ID# 32898

FP Canada Approved CE: Practice Management, 1.00

The testator era isn't coming soon; it's already here. The largest transfer of wealth in Canadian history is under way right now and executors are the conduits to their testator parents and the inheriting heirs. By virtue of their selection, executors are the most trusted and influential people in their testator parents' lives and yet, most advisors completely ignore them.

This presentation highlights the challenges modern executors face using brief case studies, the calamities that can arise and the solutions advisors can immediately offer to build crucial relationships. Attendees will learn how to stem the imminent erosion of assets, expand their client base, uncover permanent life insurance opportunities and significantly grow their AUM.

Trends in Financial Planning

Herp Lamba, Senior Vice-President, IG Wealth Management

ID# 33017

FP Canada Approved CE: Pending

Opportunity to understand current trends in financial planning and issues facing financial planners today. Learn how the business has evolved, including managed product and fee based offerings, and the ongoing value of advice. In an ever changing landscape, understand the evolution of the financial plan

Insurance for Privacy and Network Security Breaches

Roberta Tasson, The Magnes Group

ID# 33002

FP Canada Approved CE: Practice Management, 1.00

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.

Back to the Future

George Sigurdson, Customplan Financial Advisors

ID# 33018

FP Canada Approved CE: Pending

George will be using his 50 years of industry experience to discuss what it takes to be successful in the insurance and wealth management business. First, he will drill down into what activities an agent needs to focus on in order to truly "get into" the industry and what needs to be done to stay in the industry. It will look at providing advisors with the tools to ensure they have the attitude and the right activity for a successful practice. Next, he will discuss the process that is required to build a successful practice and maintain that practice in a compliant manner while ensuring that all of the client's needs are fully met. He will take advisors through a step-by-step guide of client engagement that addresses all aspects of intergenerational financial security, from setting up chequing accounts, through various savings and protection solutions, right up to engaging grandparents to start the process for the grandchildren. Finally, George will discuss how what we do is more than just a paycheque, it is a way of life that requires passion and caring for people.