IFB BC Fall Summit 2019

October 23 2019

River Rock Casino Resort, Richmond, BC

	Whistler Ballroom B
9:00 a.m. - 10:00 a.m.	**Canadian Small Businesses: Issues & Opportunities in 2019** *Victoria Gubbe, Canada Life* FP Canada Approved CE: Financial Planning, 1.00
10:00 a.m. - 10:15 a.m.	**Coffee Break**
10:15 a.m. - 11:15 a.m.	**Term Plus, Protecting the present, Planning for the future** *Geoffrey Mo, SSQ Insurance* FP Canada Approved CE: Product, 1.00
11:15 a.m. - 11:30 a.m.	**Coffee Break**
11:30 a.m. - 12:30 p.m.	**Do you know how Assuris protects your clients?** *Alisha Hameed & Gordon Dunning, Assuris* FP Canada Approved CE: Financial Planning, 1.00
12:30 p.m.- 1:30p.m.	**Lunch Break**
1:30 p.m. - 2:30 p.m.	**Trends in Financial Planning** *Jason Klein, IG Wealth Management* FP Canada Approved CE: Financial Planning, 1.00
2:30 p.m. - 2:45 p.m.	**Coffee Break**
2:45 p.m. - 3:45 p.m.	**Advisor Bionics, The Future of Financial Advice** *Dave Faulkner, Razor Logic Systems* FP Canada Approved CE: Practice Management, 1.00
3:45 p.m. - 4:00 p.m.	**Coffee Break**
4:00 p.m. - 5:00 p.m.	**Insurance for Privacy and Network Security Breaches** *Roberta Tasson, The Magnes Group* *FP Canada Approved CE: Practice Management, 1.00*

IFB 2019 BC Summit Presentations

Advisor Bionics, the Future of Financial Advice *Dave Faulkner, Razor Logic Systems Inc.*
FP Canada Approved CE: Practice Management, 1.00

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.

Do you know how Assuris protects your clients?
Alisha Hameed & Gordon Dunning, Assuris
FP Canada Approved CE: Financial Planning, 1.00

Assuris is the not for profit organization that protects Canadian policyholders if their life insurance company fails. This presentation explains Assuris’ role at the time of a life insurance company failure. We explain how our protection is applied at the time of failure: Death Benefit, Health Expense, Monthly Income, Cash Values and Accumulated Value Benefits. Protection of Seg funds and GMWBs are also discussed further in detail.

Trends in Financial Planning
Jason Klein, IG Wealth Management
FP Canada Approved CE: Financial Planning, 1.00

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.

Term Plus, Protecting the present, Planning for the future
Geoffrey Mo, SSQ Insurance
FP Canada Approved CE: Product, 1.00

By choosing our Term Plus product, whether it is for personal, business or loan insurance needs, your clients will benefit from a tailored solution of combining disability credit protection and critical illness coverage with term life insurance.

Come and hear about the many advantages that a term insurance product has to offer and take the opportunity to grow your business, while protecting your clients and offering a unique and competitive product.

Canadian Small Businesses: Issues & Opportunities in 2019

Victoria Gubbe, Canada Life
FP Canada CE Approved: Financial Planning, 1.00

This presentation covers taxation of active & passive income earned by CCPC's under the current administration, monetizes the increased tax cost, and provides a potential solution using life insurance.

Insurance for Privacy and Network Security Breaches
Roberta Tasson, The Magnes Group
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.