

# IFB 2020 Saskatoon Regional Presentations

## **Supercharge your Processes, Technology and Team for Maximum Growth**

*Shyam Ganesh, Valenta BPO*

*FP Canada Approved CE: Pending*

In this interactive presentation, Valenta BPO will share best practices for building a Financial Advisory practice. When an advisor leverages the right processes, technology and team to free up time to do what they do best - build relationships - the results are enormous: revenue growth, a "wow" client experience, stress-free delivery, and scalability/saleability of your business. No matter what stage of growth your business is in, you'll walk away having completed a series of self-assessments and with a clear plan of action to implement at least one process improvement in your business.

## **Fixed Income Investments & GIC Portfolio Strategies**

*TBC, Home Trust*

*FP Canada Approved CE: Pending*

Home trust is focused on a unique segment of the Canadian marketplace: consumers whose specific needs are not met by larger financial institutions. Home Trust offers competitive GIC solutions for Canadians from coast to coast. Learn more about fixed income investment products, GIC portfolio strategies and compliance requirements for GICs.