

7:30 - 8:30

**Registration & Coffee**

Hall A

8:30 - 9:30

**The Prosperity Factors for Financial Advisors'***Kelley Keehn, Author, Personal Finance Educator, Speaker, Media Personality, Consumer Advocate*

FP Canada Approved CE: Financial Planning, 1.00

RIBO TBC



9:30 - 9:40

*Chartwell Coffee Sponsor Message*

9:30 - 9:45

**Coffee Break**

9:45 - 10:45

**Charitable Giving – Tax Efficient ways to Share Your Wealth***Andrew Mackenzie, Regional Director, IG Wealth Management*

FP Canada Approved CE: Financial Planning, 1.00

RIBO TBC



10:45-11:00

**Break**

11:00-12:00

**Do you know how Assuris protects your clients?***Alisha Hameed & Josée Rheault, Assuris*

FP Canada Approved CE: Financial Planning, 1.00



12:00 - 1:00

**Lunch**

1:00- 2:00

**Digital Solutions that Give You a Competitive Edge***James O'Connell, Humania Assurance Inc.*

FP Canada Approved CE: Product, 1.00



2:00 - 2:15

**Break**

2:15 - 3:15

**Supercharge your Processes, Technology and Team for Maximum Growth***Shyam Ganesh, Valenta BPO*

FP Canada Approved CE: Practice Management, 1.00

RIBO TBC



3:15 - 3:30

**Coffee Break**

3:30 - 4:30

**K&R Crisis Prevention***Gary Hirst, President & CEO, CHES Special Risk Inc.*

FP Canada Approved CE: Product, 1.00

RIBO TBC



4:30 - 4:45

**Break**

4:45 - 5:45

TBC

18-Jun-20	
7:30 - 8:30	<p>Registration &amp; Coffee</p> <p>Hall A</p>
8:30 - 9:30	<p><b>Mental Health &amp; The Financial Advice Relationship</b>  <i>Carol Lynde, President &amp; CEO Bridgehouse Asset Managers</i>            FP Canada Approved CE: Financial Planning, 1.00            RIBO Management</p> <p>1  Approved CE  <small>FP Canada</small></p>
9:30 - 9:45	<p>Break</p>
9:45-10:45	<p><b>Arthur Fish, Borden Ladner Gervais LLP</b>            Outline to Follow</p>
10:45 - 11:00	<p>Coffee Break</p>
11:00 - 12:00	<p><b>Business Continuity 101</b>  <i>Roland Chan, CEO, FindBob</i>            FP Canada Approved CE: Practice Management, 1.00            RIBO Pending</p> <p>1  Approved CE  <small>FP Canada</small></p>

## **The Prosperity Factors for Financial Advisors'**

*Kelley Keehn, Author, Personal Finance Educator, Speaker, Media Personality, Consumer Advocate*

*FP Canada Approved CE: Financial Planning, 1.00*

*RIBO Pending*

During this hour presentation, award-winning, best-selling author, and media personality, Kelley Keehn will take participants through a new mindset to money and a unique lens at looking at their clients and the younger generation. Kelley examines tenants of the psychology of money and what's holding your clients back at a deeper level, the latest research in behavioral economics - why you and your clients aren't as rational as you'd like to believe, and how marketing to women can increase your market share and help with retention of assets.

Participants will walk away with a basic understanding of:

- Why Canadians don't feel good about money, are reluctant to talk about it and how tapping into the deep issues your client's families have about money will open the door for more referrals, especially to younger generations
- How irrational financial behavior might be tripping up your clients daily financial decisions; from faulty mental accounting, to falling victim to the availability error (why your clients may buy lotto tickets and accidental death coverage when they should be buying critical illness and other insurance) and the willpower effect; educating your clients on these missteps will help them navigate their financial life with greater awareness and enjoyment
- Learn how 70% of women leave her primary financial advisor when her spouse dies (this increases to 75% for high net worth) and how you can hold on to more of these relationships and build stronger bonds with your female clients.

## **Charitable Giving – Tax Efficient ways to Share Your Wealth**

*Andrew Mackenzie, Regional Director, IG Wealth Management*

*FP Canada Approved CE: Financial Planning, 1.00*

*RIBO Pending*

This Charitable Giving seminar will help you discuss tax-efficient ways clients and prospects can share their wealth. From what and how to give, gifting corporately, and building a legacy – this seminar highlights insights for various situations through three unique client case studies, and how charitable giving can strategically fit within a broader financial plan.

## **Mental Health & The Financial Advice Relationship**

*Carol Lynde, President & CEO Bridgehouse Asset Managers*

*FP Canada Approved CE: Financial Planning, 1.00*

*RIBO Management*

Mental health has become a matter of increasing public concern worldwide. In Canada, by age 40, half of the population will have, or will have had, a mental illness. In 2016, Bridgehouse Asset Managers identified a connection between mental health and sound financial decision-making and partnered with the Canadian Mental Health Association–Toronto (CMHA) to lean on their mental health expertise. This collaboration has broken new ground by rallying Canada’s investment sector – companies and regulators – to consider solutions to this complex issue.

Since unveiling the *Mental Health & The Financial Advice Relationship* program, Carol Lynde (Bridgehouse President & CEO) has presented to thousands of advisors. Whether through small branch meetings, national conferences or the CE-accredited webinar series, the award-winning initiative has received exceptionally positive feedback from the advisor community. The presentation, built with research, advisor interviews and mental health expertise, gives an overview of the current mental health landscape and its impact on investors. Further, it provides advisors with a suite of educational tools and real life scenarios that they can apply with their clients who may be experiencing mental health issues.

Interaction with advisors and their feedback has confirmed Bridgehouse’s belief that advisors are in need of tools and guidelines when dealing with clients experiencing mental health issues.

Join us to find out more about *Mental Health & The Financial Advice Relationship*.

*Teaser statistics & learning objectives:*

### **Did you know?**

- 1 in 5 Canadians live with a mental health issue
- 85% of advisors spend more time with clients experiencing mental health issues

### **How do you, as an advisor, detect a crisis early on when managing your client relationships?**

In this presentation, you’ll:

- Learn tips & strategies for working with clients experiencing mental health challenges
- Discover how to maintain balance & set boundaries
- Get practical tools you can use with your clients

### **Do you know how Assuris protects your clients?**

*Alisha Hameed & Josée Rheault, 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.

### **Digital Solutions that Give You a Competitive Edge**

*James O'Connell, Humania Assurance Inc.*

*FP Canada Approved CE: Product, 1.00*

Learn about the Quebec based company and how they can help change the way you do business. Whether it's utilizing technology to help streamline your sales process or using niche products to serve a broader demographic, Humania can help.

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

*Shyam Ganesh, Managing Partner, Valenta BPO*

*FP Canada Approved CE: Practice Management, 1.00*

*RIBO 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.

### **K&R Crisis Prevention**

*Reducing the likelihood of a critical external risk & helping clients to be better prepared*

*Gary Hirst, President & CEO, CHES Special Risk Inc.*

*FP Canada Approved CE: Product, 1.00*

*RIBO Pending*

Organisations should understand their vulnerabilities and how to best manage these in the event of a crisis to limit or negate the impact to the continuity of operations. A robust prevention plan identifies and protects the assets, resources and personnel that have the greatest impact on the continuity of operations. Learn the basics of creating a Crisis Management Plan, including travel risk management, intelligence and global risks, travel security training, and specialized training for executives who may be part of a corporation's crisis or incident management team.

## **Business Continuity 101**

*Roland Chan, CEO, FindBob*

*FP Canada Approved CE: Practice Management, 1.00*

*RIBO Pending*

Are you tired of just attending sessions on the subject of Business Continuity and ready to take action?

If you're like most advisors you understand the importance of business continuity but need a way to get started. In this session, Roland Chan, CEO of FindBob, will help you assess your practice's state of readiness to deal with unexpected events - like your sudden inability to come to the office tomorrow - from both an operational and service perspective. Next, he'll outline the 3 Ps to Business Continuity Success - Planning, Partnering and Protecting. Finally, he'll give the IFB members actionable tasks to complete on IFB's Coming Up Next that will allow them once and for all establish a Business Continuity Plan that will protect their clients, their staff, and their family! Not only will this session create some efficiency with respect to the Business Continuity process, you'll ultimately save money, increase your business's value, and come away with at least one new client marketing idea!