

2020 IFB Fall Virtual Summit Presentations



Cyber Security and the New Normal

Roberta Tasson, The Magnes Group

FP Canada Approved CE: Pending

RIBO

AAC ID#

Manitoba ID#

In these times of physical distancing and remote work, it's become even more crucial to ensure strong cyber security measures are in place for your business. The global pandemic presented an opportunity for cybercriminals to capitalize on the growing levels of concern and fear. Given ongoing heightened risks, it is critical for businesses to inform themselves of the cyber threats and to take adequate steps to protect themselves, their employees, and their clients. Key items to be covered in this session are:

- Scope of cyber threats
- What measures should businesses use to prevent cyberattacks during and after the pandemic?
- Cyber insurance as a transfer risk solution

A Matter of Trust

Rod Burylo, Business Development Manager, Croft Financial Group

FP Canada Approved CE: Professional Responsibility, 1.00

RIBO Ethics

AAC ID#

Manitoba ID#

This course introduces Financial Advisors to the most important concepts and issues related to trust and the financial services industry. This seminar is provided by financial services author, educator, and ethics specialist, Rod Burylo.

What is Paraplanning and how it can increase your profitability

Shyam Ganesh, Valenta BPO Solutions

FP Canada Approved CE: Pending

RIBO

AAC ID#

Manitoba ID#

As a financial advisor, you are under constant pressure from regulators, the media and clients not only to deliver value but also to continuously justify and quantify it. The surest way of doing this is to integrate financial planning into your practice, which means that you are now spending more time per client than ever before. However, most advisors are not making more to compensate for this shift. So how do you increase profitability in your practice? Join us to learn what paraplanning is and how you can delegate not only administrative tasks but also higher level financial planning tasks to ensure your time is focused on relationships and growth.

Do you know how Assuris protects your clients?

Alisha Hameed, Assuris

FP Canada Approved CE: Financial Planning, 1.00 (ID# 7307)

AAC ID# 54564 | A&S, 1.00 | Life, 1.00

Manitoba ID# 34264

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.

Innovative Web Solutions 2.0

Roberta Lust, Humania Assurance

FP Canada Approved CE: Pending

AAC ID#

Manitoba ID#

Humania Assurance – your technologically advanced carrier! Humania is the whole package for your online insurance needs. From babies to baby boomers, healthy clients to hard to insure, Humania has an online insurance platform that has you covered. This presentation will provide you the sweet spots of their online product shelf and focus on how to integrate these innovative online solutions into your practice.

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 (ID# 7337)

AAC ID#

RIBO Pending

Manitoba ID#

Organizations 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.

Pragmatic Succession - Steps You Can Take Now For Those Serious About A Successful Transition

Roland Chan, Coming Up Next

FP Canada Approved CE: pending

AAC ID#

RIBO Pending

Manitoba ID#

Roland Chan, CEO of FindBob, will share 3 unique case studies and provide actionable tips to advisors who are contemplating succession for their practice. The 3 case studies will focus on an external sale, an internal sale, and the hiring and grooming of a G2 advisor. Finally he'll conclude with a demonstration of the Coming Up Next platform's *Deal Room* feature that will show how IFB members can utilize their free member benefit to accelerate finding an adequate succession partner.

Using Pension Legislation to Save Taxes and Grow your AUM

Jean-Pierre Laporte, CEO, INTEGRIS Pension Management Corp. & Mark Taucar, CFA, Accilent Capital Management

FP Canada Approved CE: pending

AAC ID#

RIBO Pending

Manitoba ID#

In a post-pandemic world, it is inevitable that taxes will increase as the government seeks to recoup some of the money distributed in its emergency relief efforts. For financial advisors with business-owner clients, knowing how to minimize taxes will make you an indispensable partner in protecting and growing assets.

Personal Pension Plans (PPP®) offer five critical features to protect small business owners and their families:

- Creditor protection under pension legislation
- Super priority under bankruptcy laws
- The ability to create new registered pension room using special payments, past service and terminal funding
- Enhanced basic portfolio management techniques
- A means for surviving family members to avoid tax consequences of the deemed disposition rules should death occur

Jean-Pierre Laporte, MA, BA, JD, is CEO of INTEGRIS Pension Management Corp., and a pension lawyer. He has written extensively on pension matters and is often called as an expert witness before the House of Commons Standing Committee on Finance. Along with Mark Taucar, CFA, he has authored a new must-do course for financial advisors who want to become accredited in providing advice on integrating a Personal Pension Plan strategy for their clients.

Attend this information session to learn how a PPP® can benefit your clients (or your own family business), and hear how IFB members can get a significant discount on the Personal Pension Planning course offered through the Knowledge Bureau.

FIXED INCOME INVESTMENTS AND GIC PORTFOLIO STRATEGIES

Christina Fazio, Home Trust

FP Canada Approved CE: pending

AAC ID#

Manitoba ID#

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.

More to come -- check back often for updates