

2020 IFB Fall Virtual Summit Presentations



November 3rd 2020-

11:30am-12:30pm

Mental Health & The Financial Advice Relationship: Updated with new Research!

Carol Lynde, President & CEO Bridgehouse Asset Managers

FP Canada Approved CE: Financial Planning

RIBO Management

AAC ID# 55696 (1.00 Life, 1.00 A&S, 1.00 General)

Manitoba ID# 35185



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

1:00pm-2:00pm

A Matter of Trust

Rod Burylo, Business Development Manager, Croft Financial Group

FP Canada Approved CE: Professional Responsibility

RIBO Ethics

AAC ID# 55686 (1.00 Life, 1.00 A&S)

Manitoba ID# 35174



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.

Do you know how Assuris protects your clients?

Alisha Hameed, Assuris

FP Canada Approved CE: Financial Planning

AAC ID# 55688 (1.00 Life, 1.00 A&S)

Manitoba ID# 35176



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.

Simplified & Guaranteed Issue and Traditional Products on Eapp!!

Deano Delides, Paul Grunsell & Adeline Thomson, SSQ Insurance

FP Canada Approved CE: Product

AAC ID# 55693 (1.00 Life, 1.00 A&S)

Manitoba ID# 35182



Discover our new products and see how they meet the needs of many Canadians! Let's review how our Simplified eapp takes you from submission to policy delivery in 60 minutes or less!! And for our traditional products - we can do that to with our web based electronic-application!!

2:30pm-3:30pm

The evolution of regulation in the midst of an evolving investment industry and investor needs

Andrew J. Kriegler, President and CEO, IIROC

FP Canada Approved CE: Pending

AAC ID# Pending

Manitoba ID# 35187

Andrew will discuss how the investment industry has been transforming in order to meet the changing needs of Canada and how all of this is putting tremendous pressure on the existing regulatory framework. He will focus on how self-regulation needs to evolve in a way that reduces the regulatory burden/duplicative regulation for a broad range of market participants while enhancing the regulatory and economic system and investor protection. He will do so by outlining IIROC's proposal for the future of self-regulation and IIROC's submission to the Canadian Securities Administrators Consultation on the SRO framework. In this context, he will talk about research that IIROC engaged Accenture, Deloitte LLP, The Strategic Counsel and Navigator LLP to conduct to better understand the opportunities and challenges faced by the financial services industry in order to better serve Canadians. Additionally, he will discuss how the pandemic has accelerated the need for regulation to evolve and share some of the ways that IIROC demonstrated flexibility, adaptability and responsiveness during a period of profound economic uncertainty – everything from our ability to oversee/regulate the markets to the ability to make exemptions and provide relief to smaller and mid-sizes firms without impacting investor protection.

FIXED INCOME INVESTMENTS AND GIC PORTFOLIO STRATEGIES

Christina Fazio & Sheldon Solomon, Home Trust Company

FP Canada Approved CE: pending

AAC ID# 55692 (1.00, Life)

Manitoba ID# 35181

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.

Cyber Security and the New Normal

Roberta Tasson, The Magnes Group

FP Canada Approved CE: Practice Management

RIBO Technical

AAC ID# 55685 (1.00 Life, 1.00 General)

Manitoba ID# 35173



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

4:00pm-5:00pm

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: Financial Planning

AAC ID# 55691 (1.00, Life)

RIBO Technical

Manitoba ID# 35180



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.

November 4th 2020-

11:30am-12:30pm

What is Paraplanning and how it can increase your profitability

Shyam Ganesh, Valenta BPO Solutions

FP Canada Approved CE: Practice Management

RIBO Personal Skills

AAC ID# 55687 (1.00, Life)

Manitoba ID# 35175



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.

1:00pm-2:00pm

Innovative Web Solutions 2.0

Roberta Lust, Humania Assurance

FP Canada Approved CE: Product
AAC ID# 55697 (1.00 Life, 1.00 A&S)
Manitoba ID# 35177



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.

Do have a BIG Idea to succeed in the new economy?

Bill Bishop, Bishop Communications Inc.

FP Canada Approved CE: pending
RIBO Personal Skills
AAC ID# 55694 (1.00 Life, 1.00 General)
Manitoba ID# 35183

To stand out in today's crowded financial services marketplace, and compete with robo-advisors in the new economy, you need to create and package a BIG Idea, something new, better and different that your clients can only get from you. Armed with a one-of-a-kind BIG Idea, you will have greater success with your sales and marketing efforts. You will attract more high-quality prospects, sell more profitable financial products and services, and take your business to a much higher level of success. In this presentation, we explain how to use a BIG Idea to supercharge your marketing, generate more revenue from your clients, and build a new economy financial service 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

AAC ID# 55689 (1.00 Life, 1.00 General)

RIBO Technical

Manitoba ID# 35178



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.

2:30pm-3:30pm

Marketing at a Distance: Steps To Transform Your Business

Julie Rempel & David Robinson, Vexxit Inc.

FP Canada Approved CE: Practice Management

RIBO Personal Skills

AAC ID# 55695 (1.00 Life, 1.00 General)

Manitoba ID# 35184



2020 has brought countless unexpected shifts to our personal and professional lives. Our tried and true ways of doing business have changed drastically. How do we build relationships, strengthen our brands and communicate our value in this new normal? Learn how you can embrace this shift and see your business thrive

An Introduction to Equitable Bank and Equitable Bank's CSV Line of Credit Product Offering

Michael Pilz, Equitable Bank

FP Canada Approved CE: Pending

AAC ID# Pending

Manitoba ID# 35186

This session/presentation will focus on Equitable Bank's CSV Line Of Credit Product offering. One of the many and major benefits of Whole Life Insurance policies is the Cash Surrender Value (CSV) associated with the policy. This CSV is a real and important function of a policy. It is a true and verifiable Asset. When policy holders wish to access this Asset (for whatever reason), the most efficient and

beneficial manner in which to do so, is often via a collateral assignment with a third party Financial Institution....like Equitable Bank. Attend/view this presentation to learn more.

4:00pm-5:00pm

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

Roland Chan, Coming Up Next

FP Canada Approved CE: Practice Management

AAC ID# 55690 (1.00 Life, 1.00 General)

RIBO Personal Skills

Manitoba ID# 35179



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.

More to come -- check back often for updates