

# 2021 IFB Spring Virtual Summit Presentation Outlines



**May 4<sup>th</sup> 2021-**

**11:30am-12:30pm**

## **The impacts of Caregiving**

***The Caregiving Crisis and the Role Advisors Play – A head-on approach to financial caring***

*Dr. Amy D'Aprix, Founder, Life Transitions by Dr. Amy*

*FP Canada Approved CE: Practice Management (ID# 8914)*

*RIBO Personal Skills*

*AAC ID# 57148 (1.00 Life, 1.00 A&S, 1.00 General)*

*Manitoba ID# 36308*



Caregiving impacts us ALL.

Likely, you're already providing financial advice to clients in, or soon to be in, a Caregiving situation. So why is this inevitable life transition a crisis for so many? Dr. Amy D'Aprix takes an informed client viewpoint, sharing what advisors can do to help clients plan for providing – or needing – Caregiving, why Covid has made clients more open to these discussions, and how these types of non-financial conversations deepen client relationships, engage multi-generations, and position you as a trusted advisor of choice.

## **OUTCOMES:**

- Understand why Caregiving is such an important issue to address with clients, now.
- Discover the practical, emotional, family, and financial implications of Caregiving and how they will help you better understand your clients' struggles.
- Explore the different kinds and costs of care that will inform a plan for the financial impacts clients will face.
- Learn how and when to raise this topic in client conversations.

**1:00pm-2:00pm** (3 breakout sessions to choose from)

## **Insured Investments for Growth and Estate Planning!**

*Paul Grunsell and Dan Sims, SSQ Insurance*

*FP Canada Approved CE: Financial Planning (ID# 8919)*

AAC ID# 57153 (1.00 Life)

Manitoba ID# 36313



During this presentation we will be discussing on how to compete directly on costs and performance in the very competitive investment marketplace. Also you will learn how insurance brokers are using their unique licence to gather assets and add value for their clients. Plus find out the latest details about La Capitale and SSQ Insurance. We sincerely look forward to hosting you!

### **What to look for in a Banking Partner**

*Nader Salameh, VP Lending Referral Partnerships, BMO Bank of Montreal*

*FP Canada Approved CE: Product (ID# 8913)*

AAC ID# 57147 (1.00 Life)

Manitoba ID# 36307



As the only major bank operating in the advisor space, BMO has a unique value proposition to offer financial professionals address specific practice and client situations. Find out why BMO's non-solicitation agreement makes us a referral partner that advisors can trust. You'll learn what makes our products different, and how BMO's specific niches in the mortgage marketplace can give your clients flexibility.

### **Taxes in a Post-Pandemic World**

*Oscar Torres, CPA, CA, LPA, Bateman MacKay CPAs and Business Advisors*

*FP Canada Approved CE: Financial Planning (ID# 9006)*

*RIBO Management*

AAC ID# 57352 (1.00 Life, 1.00 General)

Manitoba ID# 36320



We are gradually seeing light at the end of the COVID-19 tunnel, and many financial professionals and business owners are concerned about the tax implications of the pandemic, both for their clients and for their own practice. Oscar Torres, Assurance and Advisory Partner at Bateman MacKay, will discuss possible scenarios, planning strategies, and the impact of buying investments in a holding company.

**2:30pm-3:30pm**

**A Pragmatic Guide to Buying and Selling a Practice**

*Roland Chan, FindBob*

*FP Canada Approved CE: Practice Management (ID# 8996)*

*RIBO Management*

*AAC ID# 57349 (1.00 Life, 1.00 General)*

*Manitoba ID# 36318*



The financial advice industry is going through a seismic shift, forcing every advisor to focus on the key question: "How can I sell or transition my practice?". Roland Chan, Founder and CEO of FindBob, will deliver this webinar designed to help advisors that are looking to sell their practice or acquire someone else not only identify the right transition partner but develop the right transition strategy. Lastly, Roland will share IFB's Coming Up Next™ and how the member-only tools can enable financial advisors to capture this opportunity, protect clients and grow their business.

**4:00pm-5:00pm**

**A perspective on private health insurance in Canada and why it's time to consider it as an option today**

*Deep Bajwa, Best Doctors Insurance Canada Services Inc.*

*FP Canada Approved CE: Practice Management (ID# 8925)*

*AAC ID# 57155 (1.00 A&S)*

*Manitoba ID# 36315*



During this presentation we will be discuss how the Canadian health care system has changed over the years. In addition, we'll discuss how there are 13 different health care systems in Canada, not 1 thus lacking uniformity. We will discuss how 2 main health care problems are impacting Canadians; medical wait times and difficult access to the best medical technology available in the world. Plus, you'll learn how advisors are using Best Doctors Insurance to address these problems for their clients. We're excited to connect with you!

**May 5<sup>th</sup> 2021-**

**11:30am-12:30pm**

**Sales, Stereotypes and Seniors: Building Trust with Your Mature Clients**

*Amanda Richards, Chartwell Retirement Residences*

*FP Canada Approved CE: Practice Management (ID# 8918)*

*RIBO Personal Skills*

*AAC ID# 57152 (1.00 Life, 1.00 A&S, 1.00 General)*

*Manitoba ID# 36312*



As financial professionals, you interact with and sell to clients of varying ages. Join Canada's largest retirement living organization for an informative session on how to build trust and connections with your senior clients. Working through the general steps of the sales process, we'll help you become more familiar with some of the best practices we've cultivated from years of working with older adults to help you find customized solutions to their unique situations. As the population continues to age at rapid pace, the strategies outlined in this session will help prepare you and your business to accommodate the needs of your current and future customers.

**1:00pm- 2:00pm** (3 breakout sessions to choose from)

**GICs - Minimize the risk, Maximize the reward**

*Christina Maurice Fazio and Sheldon Solomon, Home Trust*

*FP Canada Approved CE: Product (ID# 8917)*

*AAC ID# 57151 (1.00 Life)*

*Manitoba ID# 36311*



Learn about GICs. Maximize GIC returns while protecting your clients against interest rate fluctuations by using the proven strategy of GIC laddering. This investment strategy will allow you to efficiently maximize the performance of your client's fixed income portfolio while minimizing the risk. In addition, GIC laddering provides your clients with convenient access to a portion of their GIC portfolio every year.

**Help Your Clients Access the Cash Surrender Value (CSV) in their Whole Life Policy**

*Danielle Pears, Equitable Bank*

*FP Canada Approved CE: Product (ID# 8915)*

*AAC ID# 57149 (1.00 Life)*

Manitoba ID# 36309



Are your clients looking for quick access to tax-free cash? Equitable Bank offers a CSV Flex and CSV MAX line of credit products that are secured against the cash surrender value (CSV) of whole life insurance policies.

**Protect your Small Business from Cyber Threats on all Fronts: High Performance Antivirus Software and Insurance Coverage for Privacy and Network Security Breaches**

*Roberta Tasson, Partner, The Magnes Group & Kobi Kalif, Reason Cybersecurity*

*FP Canada Approved CE: Practice Management (ID# 8937)*

*RIBO Technical*

*AAC ID# 57347 (1.00 Life, 1.00 General)*

*Manitoba ID# 36316*



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. In fact, 43% of all cyber-attacks target small businesses, with the most common types of attacks being data breaches, ransomware, and phishing. 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. So how can small businesses protect themselves against vicious cyber-attacks and hackers' ongoing attempts to steal their valuable financial data? Reason Cybersecurity, a leading cybersecurity company, along with the Magnes Group will share useful knowledge and tips that will help your business be cyber aware.

**2:30pm-3:30pm** (3 breakout sessions to choose from)

**The most tax efficient mutual fund in your portfolio!**

*Shayla Romanyshyn & Wanda Hunchak, Golden Opportunities Fund.*

*FP Canada Approved CE: Financial Planning (ID#9005)*

*AAC ID# 57351 (1.00 Life)*

*Manitoba ID# 36319*



Golden Opportunities Fund investments are managed by Westcap Mgt. Ltd., a venture capital and private equity Fund Manager that has raised invested more than \$1 billion in Western Canada. Since inception over 20 years ago, Golden Opportunities has deployed capital into 145 companies. The Fund's

unique investment philosophy provides your clients with some of the most tax efficient financial planning tools available on the market and allows them to keep their money invested locally. This presentation will provide you with the tools to add value for existing clients and grow your book of business bringing in new clients by positioning Golden Opportunities Fund in your portfolio. Your clients will enjoy the benefits of additional tax savings and their hard-earned money will remain invested in the local economy.

### **Explore Disability Insurance!**

*Roberta Lust, Humania Assurance*

*FP Canada Approved CE: Product (ID# 8916)*

*AAC ID# 57150 (1.00 A&S)*

*Manitoba ID# 36310*



Selling disability insurance is easier than ever before with an innovative new disability product that is online based. Humania Assurance is known as an innovative leader in Disability Insurance in the Quebec marketplace – let us show you how you can incorporate more disability insurance into your business

### **Learn about the real compensation structure of the 3 layers of ownership**

*Jamie Prickett, Experior Financial Group*

*FP Canada Approved CE: Practice Management (ID# 8920)*

*RIBO Management*

*AAC ID# 57154 (1.00 Life)*

*Manitoba ID# 36314*



1. Your Book of Business
2. Building Your agency
3. Agency Equity is the foundation of a Legacy Program.

The Reality of building through recruiting, education and motivation is the basis for long term success. The rules of Running a fast-growing MGA in Canada, will be explored and what it takes to empower advisors to be independent and really own their business now and past retirement. Consistency and Referrals will bring all the financial rewards you aspire to receiving. Provide for long term continuance into future generations and NO need to sell your business.

**3:45 – 4 p.m. LIVE! From Las Vegas – Magician Nathan Burton!**

4:00pm-5:00pm

**Savings and Debt: Navigating Cashflow Concerns with Clients'**

*Lori Lee, Regional Director- National Accounts Western Canada, Manulife Bank*

*FP Canada Approved CE: Financial Planning (ID# 8968)*

*AAC ID# 57348 (1.00 Life)*

*Manitoba ID# 36317*



Join Manulife Bank to learn how successful Advisors have introduced banking into their practice and why it is important to manage both sides of the balance sheet. Advisors will learn how they can offer the banking instruments that are table stakes for their practice.