





# 2021 IFB Fall Virtual Summit

## October 20 & 21 | 11 a.m. - 5:30 p.m. EDT



Day One: Wednesday, October 20, 2021

11 a.m. - 12 p.m.	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: left;">  </div> <div style="text-align: center;"> <p><b>Life and Money: Connecting the Dots</b>                  Dr. Amy D'Aprix, Life Transitions by Dr. Amy                  FP Canada: Practice Management #9707                    AAC ID# 58606 (1.00 Life, 1.00 General)   Manitoba ID# 37416</p> </div> <div style="text-align: right;">  </div> </div>		
12 p.m. - 12:15pm	Time to Network -- Visit our Virtual Tradeshow!		
12:15 p.m. - 1:15 p.m. (Choose one session)	<p><b>Simplifying Disability &amp; Critical Illness Insurance - the New Standard!</b>                  Roberta Lust, Humania                  FP Canada: Pending   AAC ID# 59102                  (1.00 A&amp;S)   Manitoba ID# 37632</p>	<p><b>Economic Update</b>                  Sal Guatieri, BMO Bank of Montreal                  FP Canada: Pending   AAC ID# 58817                  (1.00 Life, 1.00 General)   Manitoba ID# 37626</p>	<p><b>How Financial Advisors can use pension legislation to increase the retirement assets of their clients without taking additional risks or costs.</b>                  Jean-Pierre Laporte, INTEGRIS Pension Management Corp.                  FP Canada: Financial Planning #9829                    AAC ID# 58821 (1.00 Life)                    Manitoba ID# 37579</p>
1:15 p.m. - 1:30 p.m.	Time to Network -- Visit our Virtual Tradeshow!		
1:30 p.m. - 2:30 p.m. (Choose one session)	<p><b>Understanding Power of Attorney 101</b>                  Christina Maurice Fazio and Sheldon Solomon, Home Trust                  FP Canada: Pending   AAC ID# 59103 (1.00 Life, 1.00 General)                    Manitoba ID# 37649</p>	<p><b>Maximize the growth of your book with the most tax efficient mutual fund!</b>                  Shayla Romanyshyn &amp; Wanda Hunchak, Golden Opportunities Funds                  FP Canada: Pending   AAC ID# 58818                  (1.00 Life)   Manitoba ID# 37630</p>	<p><b>Top 10 Lessons Learned: Keep yourself out of litigation trouble</b>                  Eric Dolden, Dolden Wallace Folick LLP                  FP Canada: Pending   RIBO: Management   AAC ID# 59104 (1.00 Life, 1.00 General)   Manitoba ID# 37650</p>
2:30 p.m. - 2:45 p.m.	Time to Network -- Visit our Virtual Tradeshow!		
2:45 p.m. - 3:45 p.m.	<p><b>FINTRAC Regulatory Update</b>                  Julie Leclerc, FINTRAC                  FP Canada: Pending                    AAC ID# 59105 (1.00 Life, 1.00 General)   Manitoba ID# 37652</p>		
45 p.m. - 4 p.m.	Time to Network -- Visit our Virtual Tradeshow!		
4 p.m. - 5 p.m.	<p><b>Be Prepared: Developing a Transition Game Plan</b>                  Roland Chan, FindBob                  FP Canada: Pending   RIBO: Management                    AAC ID# 58819 (1.00 Life, 1.00 General)   Manitoba ID# 37631</p>		

Day two: October 21, 2021

<p>11 a.m. - 12 p.m.</p>	<p>1  <b>Tax and estate planning in a Covid-19 world</b>                  John Natale, Manulife Investment Management                  FP Canada: Financial Planning #9709   AAC ID# 58609 (1.00 Life)   Manitoba ID# 37418</p> 			
<p>12:00 p.m.-12:15 p.m. <b>Time to Network -- Visit our Virtual Tradeshow!</b></p>				
<p>12:15 p.m. - 1:15 p.m. (Choose one session)</p>	<table border="1"> <tr> <td data-bbox="301 505 757 903"> <p><b>A Deep Dive into Advisor compensation and structure of the 3 layers of ownership</b>                      Jamie Prickett, Experior Financial Group                      FP Canada: Pending   AAC ID# 59106 (1.00 Life)   Manitoba ID# 37680</p> </td> <td data-bbox="757 505 1214 903"> <p><b>Travel Insurance - Don't let your clients leave without it!</b>                      Marie-Michèle Duchesneau, Tour+Med                      FP Canada: Pending   RIBO: Technical   AAC ID# 58820 (1.00 A&amp;S, 1.00 General)   Manitoba ID# 37633</p> </td> <td data-bbox="1214 505 1676 903"> <p><b>A world of no tax? Let's explore case studies with a CPA.</b>                      Jos Herman, SSQ                      FP Canada: Financial Planning #9708   AAC ID# 58607 (1.00 Life)   Manitoba ID# 37417</p> <p>1 </p> </td> </tr> </table>	<p><b>A Deep Dive into Advisor compensation and structure of the 3 layers of ownership</b>                      Jamie Prickett, Experior Financial Group                      FP Canada: Pending   AAC ID# 59106 (1.00 Life)   Manitoba ID# 37680</p>	<p><b>Travel Insurance - Don't let your clients leave without it!</b>                      Marie-Michèle Duchesneau, Tour+Med                      FP Canada: Pending   RIBO: Technical   AAC ID# 58820 (1.00 A&amp;S, 1.00 General)   Manitoba ID# 37633</p>	<p><b>A world of no tax? Let's explore case studies with a CPA.</b>                      Jos Herman, SSQ                      FP Canada: Financial Planning #9708   AAC ID# 58607 (1.00 Life)   Manitoba ID# 37417</p> <p>1 </p>
<p><b>A Deep Dive into Advisor compensation and structure of the 3 layers of ownership</b>                      Jamie Prickett, Experior Financial Group                      FP Canada: Pending   AAC ID# 59106 (1.00 Life)   Manitoba ID# 37680</p>	<p><b>Travel Insurance - Don't let your clients leave without it!</b>                      Marie-Michèle Duchesneau, Tour+Med                      FP Canada: Pending   RIBO: Technical   AAC ID# 58820 (1.00 A&amp;S, 1.00 General)   Manitoba ID# 37633</p>	<p><b>A world of no tax? Let's explore case studies with a CPA.</b>                      Jos Herman, SSQ                      FP Canada: Financial Planning #9708   AAC ID# 58607 (1.00 Life)   Manitoba ID# 37417</p> <p>1 </p>		
<p>1:15 p.m. - 1:30 p.m. <b>Time to Network -- Visit our Virtual Tradeshow!</b></p>				
<p>1:30 p.m. - 2:30 p.m.</p>	<p>1  <b>A new era of deposit protection: how changes to CDIC's trust deposit rules will affect brokers and where to next</b>                  Michael Mercer, Canada Deposit Insurance Corp. (CDIC)                  FP Canada: Practice Management #9705   AAC ID# 58604 (1.00 Life)   Manitoba ID# 37414</p> 			
<p>2:30 p.m.-2:45 p.m. <b>Time to Network -- Visit our Virtual Tradeshow!</b></p>				
<p>2:45 p.m.-3:45 p.m.</p>	<p>1  <b>Updated: A perspective on private health insurance in Canada and why it's time to consider it as an option today.</b>                  Deep Bajwa, Best Doctors Insurance Canada Services Inc.                  FP Canada: Practice Management #9704   AAC ID# 58603 (1.00 A&amp;S)   Manitoba ID# 37412</p> 			
<p>3:45 p.m. - 4 p.m. <b>Time to Network -- Visit our Virtual Tradeshow!</b></p>				
<p>4 p.m. - 4:30 p.m.</p>	<p> <b>Special Performance: The Great Canadian Dueling Pianos</b>                  Cody Fenwick &amp; Joel Lightman</p> 			
<p>4:30 p.m. - 5:30 p.m.</p>	<p>1  <b>Seniors and Technology: Lessons Learned from the Shift of Virtual Selling</b>                  Amanda Richards, Chartwell Retirement Residences                  FP Canada: Financial Planning #9706   RIBO: Personal Skills   AAC ID# 58605 (1.00 Life, 1.00 A&amp;S, 1.00 General)   Manitoba ID# 37415</p> 			