

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;"> <p>1 Approved CE FP Canada™</p> </div> <div style="text-align: center;"> <p>Life and Money: Connecting the Dots Dr. Amy D'Aprix, Life Transitions by Dr. Amy FP Canada: Practice Management #9707 AAC ID# 58606 (1.00 Life) 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>Simplifying Disability & Critical Illness Insurance - the New Standard! Roberta Lust, Humania FP Canada: Product Knowledge #9949 AAC ID# 59102 (1.00 A&S) Manitoba ID# 37632</p> <p>1 Approved CE FP Canada™</p>	<p>Economic Update Sal Guatieri and Nader Salameh, BMO Bank of Montreal FP Canada: Product Knowledge #9953 AAC ID# 58817 (1.00 Life, 1.00 General) Manitoba ID# 37626</p> <p>1 Approved CE FP Canada™</p>	<p>How Financial Advisors can use pension legislation to increase the retirement assets of their clients without taking additional risks or costs. Jean-Pierre Laporte, INTEGRIS Pension Management Corp. FP Canada: Financial Planning #9829 AAC ID# 58821 (1.00 Life) Manitoba ID# 37579</p> <p>1 Approved CE FP Canada™</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>Understanding Power of Attorney 101 Christina Maurice Fazio and Sheldon Solomon, Home Trust FP Canada: Financial Planning #9948 AAC ID# 59103 (1.00 Life, 1.00 General) Manitoba ID# 37649</p> <p>1 Approved CE FP Canada™</p>	<p>Maximize the growth of your book with the most tax efficient mutual fund! Shayla Romanyshyn & Wanda Hunchak, Golden Opportunities Funds FP Canada: Product Knowledge #9954 AAC ID# 58818 (1.00 Life) Manitoba ID# 37630</p> <p>1 Approved CE FP Canada™</p>	<p>Top 10 Lessons Learned: Keep yourself out of litigation trouble Eric Dolden, Dolden Wallace Folick LLP FP Canada: Practice Management #9950 RIBO: Management AAC ID# 59104 (1.00 Life, 1.00 General) Manitoba ID# 37650</p> <p>1 Approved CE FP Canada™</p>
2:30 p.m. - 2:45 p.m.	Time to Network -- Visit our Virtual Tradeshow!		
2:45 p.m. - 3:45 p.m.	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: left;"> <p>1 Approved CE FP Canada™</p> </div> <div style="text-align: center;"> <p>FINTRAC Regulatory Update Julie Leclerc, FINTRAC FP Canada: Practice Management #9951 AAC ID# 59105 (1.00 Life, 1.00 General) Manitoba ID# 37652</p> </div> <div style="text-align: right;"> </div> </div>		
45 p.m. - 4 p.	Time to Network -- Visit our Virtual Tradeshow!		
4 p.m. - 5 p.m.	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: left;"> <p>1 Approved CE FP Canada™</p> </div> <div style="text-align: center;"> <p>Be Prepared: Developing a Transition Game Plan Roland Chan, FindBob FP Canada: Practice Mgmt #9955 RIBO: Management AAC ID# 58819 (1.00 Life, 1.00 General) Manitoba ID# 37631</p> </div> <div style="text-align: right;"> </div> </div>		

Day two: October 21, 2021

<p>11 a.m. - 12 p.m.</p>	<p>Tax and estate planning in a Covid-19 world John Natale and Mike Richard, 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. Time to Network -- Visit our Virtual Tradeshow!</p>			
<p>12:15 p.m. - 1:15 p.m. (Choose one session)</p>	<p>A Deep Dive into Advisor compensation and structure of the 3 layers of ownership Shelden Smollan, Experior Financial Group FP Canada: Practice Mgmt #9952 AAC ID# 59106 (1.00 Life) Manitoba ID# 37680</p> 	<p>Travel Insurance - Don't let your clients leave without it! Marie-Michèle Duchesneau, Tour+Med FP Canada: Product Knowledge #9956 RIBO: Technical AAC ID# 58820 (1.00 A&S, 1.00 General) Manitoba ID# 37633</p> 	<p>A world of no tax? Let's explore case studies with a CPA. Jos Herman, SSQ FP Canada: Financial Planning #9708 AAC ID# 58607 (1.00 Life) Manitoba ID# 37417</p> 
<p>1:15 p.m. - 1:30 p.m. Time to Network -- Visit our Virtual Tradeshow!</p>			
<p>1:30 p.m. - 2:30 p.m.</p>	<p>A new era of deposit protection: how changes to CDIC's trust deposit rules will affect brokers and where to next 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. Time to Network -- Visit our Virtual Tradeshow!</p>			
<p>2:45 p.m.- 3:45 p.m.</p>	<p>Updated: 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: Practice Management #9704 AAC ID# 58603 (1.00 A&S) Manitoba ID# 37412</p> 		
<p>3:45 p.m. - 4 p.m. Time to Network -- Visit our Virtual Tradeshow!</p>			
<p>4 p.m. - 4:30 p.m.</p>	<p> Special Performance: The Great Canadian Dueling Pianos Cody Fenwick & Joel Lightman</p> 		
<p>4:30 p.m. - 5:30 p.m.</p>	<p>Seniors and Technology: Lessons Learned from the Shift of Virtual Selling Amanda Richards, Chartwell Retirement Residences FP Canada: Financial Planning #9706 RIBO: Personal Skills AAC ID# 58605 (1.00 Life, 1.00 A&S, 1.00 General) Manitoba ID# 37415</p> 		