

This year we will only be holding 8 Breakout sessions so that you can enjoy more of your time in Vegas. Your support for these Breakouts are appreciated.

Earn extra CE credits and a chance to win \$500 USD by attending any of the breakouts in their entirety.

BREAKOUTS MONDAY SEPT. 11., 2017

Please make one choice of presentation for each time slot between Breakouts 1 & 2

1:30 PM – 2:20 PM – Florentine C/D Room (Main Meeting Hall)

1 Securing Your Client's Long-Term Care – Stuart Crawford, IA Financial Group

Life and Serenity 65 is different from other life insurance because it offers you all the advantages of permanent life insurance plus financial assistance while you are living, if you experience a loss of independent existence.

Since the occurrence of Alzheimer's and Parkinson's disease is increasing, it's reassuring to know that life insurance coverage could ensure your financial independence.

1:30 PM – 2:20 PM – Florentine B Room

2 How to Open Doors to High Net Worth Clients & Gain Access to New Groups – Gino Stirpe, Best Doctors Canada Insurance Services Inc.

Learn about the latest product offering in the marketplace, sales techniques and best practices that will help you increase your income GUARANTEED with lifetime commissions!

In this presentation Gino Stirpe will:

- share some sales tips on how brokers can introduce our product to their clients
- show them some sample group rates and commissions
- help brokers identify who the ideal candidate is for our product
- how to be a niche player in this market

Please make one choice of presentation for each time slot between Breakouts 3 & 4

2:30 PM – 3:20 PM – Florentine C/D Room (Main Meeting Hall)

3 Real World Applications in Practice. "Ethics, Rules of Conduct & Practice Standards (FPSC ID # 2513) – Mike Englert, Compliance Officer - CIEPS

Although this Ethics course can be applied to the FPSC® Professional Responsibility CE credit, this course was designed so that it could be applied to any other CE requirement for any Life and/or Accident & Sickness Licensed Advisor.

All CFP® professionals and FPSC Level 1® Certificants in Financial Planning must abide by FPSC's *Standards of Professional Responsibility for CFP Professionals and FPSC Level 1*

Certificants in Financial Planning (the 'Standards'). Included under this broad umbrella are: the FPSC Code of Ethics (eight main principles to guide your conduct in all professional activities); the FPSC Rules of Conduct (the rules that reflect the specific standards of conduct expected of you); the FPSC Fitness Standards (the expectations that FPSC has for your character); and the FPSC Financial Planning Practice Standards (which outline the steps you are expected to follow in financial planning engagements).

Most of the time, the application of these standards will be relatively straight forward, for most CFP professionals and FPSC Level 1 Certificants. But on occasion, determining the right course of action may become quite difficult. The real world is full of ethical predicaments and often things are far from black and white. In these situations, it is expected that CFP professionals and FPSC Level 1[®] Certificants will exercise judgment - judgement that reflects more than just the letter of the law, but also the spirit and the specifics of the Standards.

The five case studies that follow will expose you to a number of ethical predicaments. You will then be asked a series of questions that focus on these ethical predicaments. To correctly answer these questions, you must identify the problem and determine the best approach to take in order to address it. The approach taken should address the letter – **and the spirit** - of the Standards.

Prior to this presentation, you should review and become familiar with all of the following documents:

- [Standards of Professional Responsibility for CFP Professionals and FPSC Level 1 Certificants in Financial planning which includes the following:](#)
 - FPSC Code of Ethics: Outlines the eight main principles guiding the conduct of CFP professionals and FPSC Level 1 certificants in all professional activities.
 - FPSC Rules of Conduct: Outlines the rules that accompany the Code and reflect the specific standards of conduct expected of CFP professionals.
 - FPSC Fitness Standards: Outlines the expectations that FPSC has for the character of CFP professionals and FPSC Level 1 certificants.
 - FPSC Financial Planning Practice Standards: Outlines the standardized steps to be followed in any financial planning engagement.

This Live segment will deal with five case studies:

- **Case Study One – A Confidential Secret**
- **Case Study Two – A Heated Difference of Opinion**
- **Case Study Three – An Inconvenient Truth**
- **Case Study Four – A Snake in the Grass**
- **Case Study Five – Money for Nothing**

2:30 PM – 3:20 PM – Florentine B Room

4 Multiply your Results. Why Working Harder Is Actually Killing Your Success - Jimmy Lefebvre. Apex Results Inc.

This high energy presentation helps advisors uncover the harsh reality of why putting in more hours slaving in the office is actually killing their success. Why working harder is not the path to being more effective.

Jimmy will uncover the #1 success principle used by the most successful advisors and corporations in the world past and present.

Advisors will learn how to implement this principle in their lives and business immediately to solve bigger problems with planning for clients, provide better client service and grow their businesses.

BREAKOUTS TUESDAY SEPT. 13, 2016

Please make one choice of presentation for each time slot between Breakouts 5 & 6

1:30 PM – 2:20 PM – Florentine C/D Room (Main Meeting Hall)

5 – Retirement Income Alternatives – Don Hart, IDC Worldsource

Don Hart will be doing a presentation called “Retirement Income Alternative” Don Has been using this presentation with Clients and Brokers for over 7 years with dramatic success. Don uses the Circle of Wealth sales system in all of his appointments to solve the retirement income problem for clients.

Your Clients work their entire life to grow their nest egg to a point where they can afford to retire. When they retire they are going to want their nest gg to perform three very important, very different functions:

1. First, they are going to need it to provide an income.
2. They are going to want to make sure they never run out of money, since this is all the money they will ever have it needs to last until their (or their spouse’s) life expectancy.
3. Finally, they will pass the remaining nest egg on to their heirs in the form of their legacy.

This presentation will show you how to mitigate or minimize the effects of five major risks in retirement for your clients.

1. Inflation
2. Tax Rates
3. Interest rates
4. Loss of Capital

5. Market Risk

If you are looking for a way to Increase retirement income, pay less tax now and in the future and replace those assets after your clients have passes away then this is a presentation you do not want to miss.

1:30 PM – 2:20 PM – Florentine B Room

6 – Canada Protection Plan’s E-Access System – Ayal Alalouf, Canada Protection Plan

Canada Protection Plan has an amazing E-application system designed to make doing business with Canada Protection Plan faster and easier than ever before. The system allows non-face-to-face sales and less waiting time.

The course will explain advantages that life-licensed advisors will get from the system and demonstrate the steps required to complete E-Access registration and e-application.

2:30 PM – 3:20 PM – Florentine C/D Room (Main Meeting Hall)

Please make one choice of presentation for each time slot between Breakouts 7& 8

7 – Strike Out Your Competition Yesterday – Tyler Hoffman

Life Design Analysis can search, analyze and create custom presentations of all life insurance options available to your client, helping them make an informed decision, and making your life as an advisor simpler and more successful

At Life Design Analysis, we don't take any shortcuts with your personal and client information. We follow strict encryption standards to ensure that anything you share with us, stays with us. Life Design Analysis is proudly hosted in Canada.

If the advisor does not understand the total financial planning process with the client or prospect, then either the wrong insurance product or over selling an insurance product will lead to chaos down the road. When this happens, not only is the client not properly taken care of but your Errors and Ommission Insurance will be called upon to fund the short fall in most situations.

This presentation will solve all the above and position you as an advisor who does the total job for the client or prospect.

2:30 PM – 3:20 PM – Florentine B Room

8 – More Game of Thrones – What’s Your Move? – Rod Burylo & Peter Jarman, Axxess Capital Advisors

It is our belief that this presentation would benefit all individuals in the Financial services profession. The material covered would fall into the “operation of an insurance business” part of the CE definition.

Advisors are encouraged to share their insights in this interactive session, hosted by industry leaders, and sponsored by Axxcess Capital Advisors. "

Opportunities and Implementation – Finding the practice management model that is right for you. Following a best-interest standard for your clients may mean adding services and strategies that will help you generate more client engagement and more bottom-line revenue for your practice.

The key is that it is possible to work smarter, not harder. Come out for a breakout session that will explore the opportunities to transition your business to more revenue, without additional investment in infrastructure and staff.