



Pro-Seminars

22nd ANNUAL
NATIONAL ADVISORS
CONFERENCE
TRADE SHOW &
BREAKOUT SESSIONS

Tuscany Suites & Casino

255 East Flamingo Road

Las Vegas, Nevada

September 18-20, 2023

Please keep this conference program as it contains some very important information that you will need.



If you're a closer **we have openings**

Combined is looking for confident and ambitious brokers who want to build business and expand revenue potential in the **growing living benefits market**.



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Table of Contents

Welcome from Mayor Carolyn G. Goodman	4
Welcome from Pro-Seminars	5
History of Pro-Seminars	6
2023 Conference & Trade Show Sponsors	8
2023 Company Contact Information	9
2023 Conference Door Prizes	12
Daily Opening & Closing Keynote Speakers	16
Mike's 2023 Tips - What's New To Do In Vegas	19
Las Vegas Strip Map	20
Conference: Main Platform & Breakout Agenda	
Monday, September 18, 2023	21
Tuesday, September 19, 2023	34
Wednesday, September 20, 2023	48
2023 Conference Continuing Education Credits	57
Be Ready For Higher Standards With The EPC Designation	59
Notes	63



CAROLYN G. GOODMAN
MAYOR



*From the Office of
Mayor Carolyn G. Goodman*

**PRO-SEMINARS
22ND ANNUAL NATIONAL ADVISORS CONFERENCE
TUSCANY SUITES AND CASINO
LAS VEGAS, NEVADA
SEPTEMBER 18-20, 2023**

Greetings, Attendees:

As Mayor, I am pleased to welcome you to America's most dynamic, entertaining, and intriguing city! You could not have chosen a better locale to hold Pro-Seminars' 22nd Annual National Advisors Conference. I trust you will have a splendid time connecting with colleagues, renewing relationships, and making successful connections.

I am convinced that once you get a taste of what the City has to offer, you will never want to leave. Las Vegas continues to capture the world's imagination as the City where anything is possible. With world-class hotels, award-winning restaurants, luxurious spas, fantastic shopping, the finest golf courses, spectacular entertainment, and now professional sports, Las Vegas remains one of the most diverse and electrifying destinations in the world.

At its heart Las Vegas is all about making sure residents and visitors are well taken care of, treated courteously, and shown a great time. Beyond the neon of the fabulous Strip and the Fremont Street Experience, there is another Las Vegas—one in which we are building a world-class city featuring the best in arts, culture, sporting opportunities, and quality medical care. The Smith Center for the Performing Arts has set a high standard for art and culture in our city, and I encourage everyone to take in a concert or Broadway show at this magnificent venue. Regardless of your age, a must-visit spot is the children's interactive Discovery Museum adjacent to The Smith Center. Buzzing with excitement is the Fremont East Entertainment District, a place with energy and enthusiasm coursing throughout its taverns, restaurants, and music venues.

The Greater Las Vegas area also offers beautiful weather and outdoor activities, from excellent golfing to opportunities for world-class hiking and rock climbing at the Red Rock Canyon National Conservation Area, to skiing at Mount Charleston, and a visit to the awe-inspiring Hoover Dam at the Lake Mead National Recreation Area. If history is more your speed, you are in luck because the National Museum of Organized Crime and Law Enforcement and the Neon Museum are two of the most interesting and unique experiences in the country.

I want to thank you for choosing Las Vegas and look forward to seeing you around town. Please accept my best wishes for successful conference. I know you will have a fabulous time enjoying our great city and everything it has to offer. Now what are you waiting for? The party has already started! Welcome.

Sincerely,

A handwritten signature in black ink that reads "Carolyn G. Goodman".

Carolyn G. Goodman
Mayor, City of Las Vegas

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Welcome from Pro-Seminars

September 18, 2023

The Pro-Seminars team would like to welcome all of you to fabulous Las Vegas, NV and the 22nd National Advisors Conference (NAC). Thank you very much for supporting this go to conference!

Our theme this year is “Financial Security – What a Concept!” All 2023 platform presenters will be giving you concepts, strategies, and ideas that will help you explain both complex and everyday topics more easily and clearly. You’re sure to come away with a story that will change the trajectory of your business.

This concept-focused approach is a new twist on our program so that we can provide your more value and actual ideas you can use immediately upon your return home. We want you to get the “NAC” for what it takes to leverage your current skills and marketplace to improve your income, and be a better all-around advisor for your clients and prospects!

This concept-focused approach is a new twist on our program so that we can provide you with more value and ideas that you can immediately use in your business. Our goal from this NAC is for you to leverage your current skills and marketplace, not only to improve your income, but also to be a better all-around advisor for your clients and prospects!

We would like to recognize and thank all the 2023 sponsors for their support and contribution in making this conference a success for you. A special thank you goes out to our 2023 Emerald Sponsors, Combined Insurance & iA Financial Group.

In addition, we acknowledge all the team at iA Financial Group & MILIFE Insurance and Investment Company for bringing many advisors to this years National Advisors Conference.

We hope you had the chance to attend the Meet n Greet last night, where the theme this year was “Vegas Nights, Neon Lights.” We hope that this get together gave you the opportunity to meet the companies that are supporting you, allowed you to make new friends and renew old friendships from years gone by.

On Monday morning, Mike Englert will cover some important in-house business and then we will get right into the program with our lead off keynote presentation by Dan Collison, who will set the pace for the conference with his highly acclaimed presentation “Bigger & Better; How Estate Planning Builds Your Business and Serves Your Clients.”

The Trade Show & Exhibit will be held in the Florentine “C/D” meeting room each morning from 7:00 AM – 7:45 AM and during any breaks that are provided, but we ask you to please be back in your seats by the time Mike calls the meeting to order. During these times, you will have the opportunity to visit the booths and speak with the companies and presenters who are supporting you in helping to build your businesses.

We encourage you to consider attending the Breakout sessions beginning at 2 PM on Monday and Tuesday afternoon. These breakouts will be held in the main meeting room and in Florentine “B” room located down the hall (by the washrooms) behind the main meeting room. Do not forget to register in advance for these if you have not already done so, and you could win \$500 USD for attending.

Our Pro-Seminars team would like to offer our best wishes for a remarkably successful business building 2023 22nd National Advisors Conference.

If you require any assistance while you are here, text us at, 905-328-5555 and we will be happy to assist you. Alternatively, please speak to a member of the Pro-Seminars team who are on site to help make your stay with us more enjoyable.

History of Pro-Seminars

Pro-Seminars is an all-Canadian company based in beautiful Beamsville, Ontario.

Pro-Seminars was started by Tom Miller & Alex Nicholson in 1998. Sadly, Tom passed away in 2020, but the legacy that was started carries on today with Alex and Tom's son-in-law Adam Wycimaga continuing to provide the quality services that Pro-Seminars is known for.

We invite you to join the many individual and corporate financial service clients that have utilized Pro-Seminars to effectively meet their continuing education and personal development needs.

Pro-Seminars is a leader in their field, specializing in continuing education and training designed specifically for the Insurance and Financial Services Professionals since 1998.

Pro-Seminars has presented in cooperation with the many Financial Services companies that we feature across Canada, convenient, comfortable, and quality Professional Development Continuing Education Conferences, 46+ self-study courses and various other training programs and courses since 1998.

Our CE Credits

Continuing education credits earned by using any Pro-Seminars service are valid anywhere in Canada where continuing education credits are required, regardless of where you attained the credits - BC, AB, SK, MB, ON, QC & Las Vegas, NV.

If you are a resident of AB, MB & QC, your CE credits have to be approved by your Provincial Regulators. Please check with your Provincial Regulatory bodies for any clarification on their reciprocal agreements with other Provinces, depending on the licenses that you hold.

If you are a resident of the Atlantic Provinces, you do not require CE credits to maintain your insurance licenses, but YOU DO require CE credits to maintain any Designations that you hold.

Continuing Education Credits Earned by using a Pro-Seminars service are valid for:

- Life and/or A&S Insurance license renewal
- General (P&C) license renewal for some Provinces - Some courses and seminars apply and are noted on your Certificate of Completion
- Travel Insurance for some Provinces

Pro-Seminars holds Self Accrediting / Accredited Course Provider status for:

- AB - Alberta Accreditation Committee - Life, Accident & Sickness, General / Adjuster
- BC - Insurance Council of British Columbia - Life, Accident & Sickness, General / Adjuster
- MB - Insurance Council of Manitoba - Life & General Insurance
- SK - Life Insurance Council of Saskatchewan (LICS) - Life Insurance
- SK - General Insurance Council of Saskatchewan (GICS) - General Insurance

Pro-Seminars is recognized by:

- ON - Financial Services Regulatory Authority (FSRA)

Pro-Seminars is accredited by the following Regulatory & Association Bodies:

- Registered Insurance Brokers Ontario (RIBO) - General Insurance
- QC - Chambre de la securite financiere (CSF) for some courses

FP Canada - QAFP & CFP Designation – Any CE credits earned from Pro-Seminars are considered “Verifiable” CE credits and can be used for a specific amount of the following CE categories of CE credits - Financial Planning, Practice Management, Professional Responsibility, Product Knowledge or Giving Back as per the definition of each. FP Canada leaves it up to the CFP designee to determine what category these CE credits will fall into. Please check the FP Canada website for more information.

Mutual Funds Dealer Association (MFDA) – We have courses approved for Professional Development, Business Conduct Credits – Ethics and Business Conduct Credits – Other. These are marked on your certificate of completion as such.

Investment Industry Regulatory Organization of Canada (IIROC) - Any CE credits earned from Pro-Seminars may also be used to satisfy CE requirements, provided your member firms education department has reviewed the course/seminar to ensure it complies with the Compliance and Professional Development requirements as set out in CE Rule 2650. It is important that the course you are interested in satisfies the CE Rules. Once you provide your firm with the necessary course information, your firm can determine course eligibility. This information can be found on the IIROC website.

Advocis - Any CE credits earned from Pro-Seminars are considered “Approved” CE credits for Advocis. Send your certificate to them so that these CE credits are included for your Advocis CE requirements.

Our Guarantee to You is Simple:

We will continue to provide high quality education, training and materials at the lowest price possible in Canada.

Alex Nicholson / Co-President

Alex Nicholson

Adam L Wycimaga / Co-President

Adam L Wycimaga



Peter Curtis
Benefits2

1-877-257-7725
peter@benefits2.ca
www.benefits2.ca

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2023 Conference and Trade Show Sponsors

Thank you to all the sponsoring companies for their generous support and professional presentations to enhance the financial educational process for YOU – the Advisor!

The exhibit booths are located throughout the main meeting room. This will give you the opportunity to meet and speak with all the sponsors and presenters daily from 7:00 AM – 7:45 AM prior to the presentation sessions starting, and during any breaks that are provided. However, we do ask you to be back in your seats by the start of each presentation.

There is a good chance you will be contacted by our corporate sponsors. If you are, and you can do business with them, please consider doing so. If you cannot, or if the timing is not right, please let them know and I am sure that they will not bother you.

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BRONZE

Canadian Benefit Providers. Inc.

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2023 Conference Bag Sponsor

Canadian Institute of Certified Executor Advisors - CEA

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2023 LV Conference Door Prizes

Thank you to all our Corporate Door Prize Sponsors.

Please note that door prizes will be drawn throughout the conference.

You MUST be in the meeting room to win.

Advice2Advisors – “Micro-MBA in Wealth Management” online program. This includes access to MastersSeries plus Building Bigger & Better video programs and a ton of amazing tools. This is valued at \$7,264.00.

Advisorcraft Media, SOLIS & Van Mueller – 5 Prizes. # 1- CD of Van Mueller Questions, # 2 - Jim Ruta’s latest book “Don’t Worry Retire Happy”, # 3 Jim Ruta’s 1st book, “Expert Identity Marketing”, # 4 - George Sigurdson’s book “In Search of Friends” a \$150 CAD value # 5 A \$100 VISA gift card

Acess Capital / Centurion Asset Management – 3 - \$50 Gift Certificates, 3 Centurion Golf Shirts & 3 Centurion Hats.

Barrett Tax Law – 3 Different Prizes - One is a free legal will (drafting and execution), One is Two free legal wills (for a couple - including drafting and execution) & One is a free legal will plus a power of attorney for property and a power of attorney for personal care (drafting and execution)

Benefits2 – \$100 LCBO gift card

Canadian Benefit Providers – “Vegas” Style Poker Set

Canadian Initiative for Elder Planning Studies (CIEPS) – Danier leather portfolio

Chartwell Retirement Residences – \$100 Amazon gift card

CICEA – \$200 Keg gift card

Combined Insurance – \$200 VISA gift card

CPP/Foresters – A Company Swag Bag Filled With Goodies

Don Xavier Academy – 3 books by Don Xavier – How to Remove Your Success Blockers, Unleash the Magnet in You & Motivational Cycles to Successful Selling and one \$50 Tuscany casino chip.

Ellements Financial Group – \$100 VISA gift card & a copy of Lisa Elle’s latest book - Strut: How to Kick Financial ASSETS

Financial Life Professionals – Free My Legacy Playbook Book Download Book & Planner Package

iA Financial Group – 2 - \$50 casino chips

Latitude West – 1 set of Air Pods

Legacy Financial Group Ltd – Wine and Whisky bottle(s) package

LMI Financial Group – \$100 VISA gift card

Manulife Bank – 3 - \$50 Tuscany Suites casino chips

Rick DePriest – A few special door prizes

Serenia Life – \$50 Keg gift card and some Serenia Swag

Tuscany Suites & Casino – A 2 night stay for weekday only



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MEET & GREET

with RICHARD DOLAN



A VERY SPECIAL MEET N GREET BREAKOUT SESSION WITH RICHARD DOLAN IN THE MAIN MEETING ROOM

September 19, 2023 from 5:15 pm to 6:00 pm

"Best Practices For The New Financial Life Planning Conversation"

This presentation is sponsored by The Institute of Financial Life Professionals
This will be a continuation of his Main Stage presentation that will fill in all the blanks.

In this breakout, Richard will share the actual tools used in the NEW conversation about financial life planning that will include:

- The conversational playbook
- The personal assessments for clients
- The Financial Life Vault and
- NEW action plan.

What are people saying about Richard?

- "I appreciate Richard and the impact he makes in the world." - WILLIAM JEFFERSON CLINTON, 42nd President of The United States
- "Richard is a great coach because he cares about you." - MIKE TYSON Undisputed Heavyweight Champion of the World
- "Richard is brilliant at what he does." - OPRAH WINFREY, American Host & Philanthropist
- "Richard's approach to create and realize a LEGACY-based life is revolutionary." RICHARD BRANSON, Business Magnate, Investor, Author & Philanthropist

Richard will "Buy the First Round," (breakout attendees only please) as a thank you for attending the breakout. Additional drinks can be purchased if you wish to do so.

After the presentation, mingle at the meet n greet from 6:00 to 7:00 pm and then enjoy the Vegas nightlife.

You are also welcome to get a selfie with Richard and his 2020 Miami Heat NBA Championship Ring. One of 2 championship rings gifted to him by Juwan Howard coach of the Miami Heat, for his role as an advisor with the team.

RICH

RICH

Additional Information You May Not Know About Richard Dolan... as found on www.richarddolan.com.

What do Bill Clinton, Mike Tyson and Oprah Winfrey have in common? Enter Richard "Richie" Dolan — a financial guru with a 30-year tenure in the private wealth and real estate industries, who raised over \$7 billion in assets, and is now hell-bent on mentoring others to secure a better financial future.

Dolan is currently the head of a boutique firm named Legacy, specializing in improving people's relationships with money, wealth, and worth. However, he has one passion he is fanatical about; Richie wants to create one million, millionaires, by 2030 — read that again — which he believes is achievable through transforming our relationship with money, wealth and worth through assessment, education, planning and action.

Richie has toured the globe with four United States presidents and shared a stage with Oprah Winfrey, Michelle Obama, and Ellen DeGeneres.

Richard has been a founding member of various businesses in the wealth management and investment banking business. He's served hundreds of clients and oversaw the management of nearly \$10B in client assets before migrating to the world of real estate investing. Richard served as President and partner to one of North America's longest-running private real estate investment network group representing over 35,000 doors owned measuring over \$15B in value. He sold his share in the business after eight years in 2019 for an undisclosed amount.

In 2011 Richard met Juwan Howard, a member (and later coach) of the Miami Heat. This was a turning point, as Juwan introduced him to the world of professional sports and high-powered celebrity athletes including then fellow teammates, LeBron James, Chris Bosh and Dwayne Wade. This led to the launch of a private pension plan with Juwan Howard for fellow NBA players, specializing in real estate investments in pre-construction properties across North America. Juwan gifted Richie his two NBA championship rings he won with the Heat for his role as advisor during that time.

His focus now is to take this experience and share it through his education, programs, advisory services, and coaching. As the chief architect of an academic certificate program, "The Financial Life Professional," Richie leads through lectures, coaching, and mentorship to show how to live a prosperous financial life. Drawing from research areas such as financial psychology, behavioral finance, investor resilience, and the "economics of happiness," giving rise to his very own "urban financial philosophy." A few stand out pieces of advice; when asked how he builds his teams, he replied it is best to "look for people that think and act like owners and are willing to stand for success over self-significance" — how to scale a business? Try "hiring people smarter than yourself."

A self-described "financial leadership guy" with a desire to teach people the fundamentals of finance, blessed with unbridled business acumen, maybe his dream to create one million, millionaires, by 2030, isn't so outlandish after all.



CALIFORNIAHERALD

FOX INTERVIEWER

L'OFFICIEL

Stats Globe

Wall Street International

Entrepreneur

Forbes

INFLUENCIVE

London Daily Post

Monday, September 18, 2023

Keynote Opening Speaker

Daniel Collison BA, CFP, TEP

Building Bigger & Better: How Estate Planning Grows Your Business and Serves Your Clients.



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Keynote Closing Speaker

Jim Ruta BA, RHU, EPC & Van Mueller LUTCF, LACP

5 Sure Fire Ways To Get More Prospects and Appointments, And How to Sell Your Products Like Van Sells His!



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Tuesday, September 19, 2023

Keynote Opening Speaker

Raymond Young

Mastering the Art of Building Your Business



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LMI FINANCIAL GROUP

Keynote Closing Speaker

Don Xavier

The Life Insurance Business and You!

If I knew then, what I know now!



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Wednesday, September 20, 2023

Keynote Opening Speaker

Peter Wouters RFG, CPCA, AIAA, ARP, TEP, FLMI, RHU
(U.S.), CFP, CLU, CHFC, ACS, ALHC, CHS, EPC, AFSI

*Tax And Estate Planning Leveraging The
Use Of Life Insurance As An Asset Class*



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Keynote Closing Speaker

Lisa Elle FCSI, CFP, CCS, RIS, CHS, CPCA, EPC

*Positioning Your Practice For The 51%:
What Women Really Want From Their Financial Professional*



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Mike's 2023 Tips - What's New To Do in Vegas

Exciting new things to do in Las Vegas pop-up - and sometimes implode (literally) - with mind-numbing frequency. Although it can be difficult to keep up with the pace of change, the constant churning of attractions means that there's always something new to do, even for the most seasoned Vegas veterans. Many National Advisors Conference attendees are repeat visitors, so getting the lowdown on what's up and coming might prove helpful.

Here's a list of some of the most promising new attractions:

Discovering King Tut's Tomb at Luxor: The newest museum attraction at Luxor allows guests to follow in Egyptologist Howard Carter's steps and relive the 1922 discovery of King Tutankhamun's tomb. Discovering King Tut's Tomb tells the story of Egyptian culture and Howard Carter's Exhibition through a multimedia experience that includes video, audio, and replica artifacts.

Awakening at Wynn: Wynn's newest show narrated by Anthony Hopkins, recently pressed "pause" on performances due to soft ticket sales and mixed reviews. The show has been reimagined and has made its triumphant return. In addition to a storyline that follows a heroine that must confront the forces of light and darkness, the production also includes comedy, aerial routines, acrobatics, stunning visuals, and illusion.

Princess Diana: A Tribute Exhibition at Crystals: This tribute to Princess Diana is located within the high-end Crystals shopping mall in front of Aria. Inside, fans will discover 12 themed rooms and 700+ artifacts from Diana's life. Themes include "Wedding of the Century", "Fashion Icon", and "Gone Too Soon: A Memorial."

Paradox Museum: Located in the Showcase Mall next door to MGM Grand, the Paradox Museum affords guests the opportunity to get some truly "mind-bending" photos. The museum offers 90+ exciting exhibits (including "the Upside-Down room").

MSG Sphere: Set to open on September 29, 2023, with U2 performing a 25-show residency U2:UV Achtung Baby Live at Sphere, the \$1.8 billion MSG Sphere is located behind the Venetian and Palazzo and will be a theater unlike any other in Las Vegas. The venue's LED screen, which is larger than 3 football fields, will not only sit in front of the audience but wrap around and above them. The dome's exterior puts on a show of its own, every night, which is readily visible from the Tuscany Suites.

The Movie Prop Experience: Located in Neonopolis, this museum is dedicated to showcasing props used in hit TV shows and movies that span the genre spectrum. Items currently on display include Wolverine's claws, Han Solo encased in carbonite, Iron Man's hand, and much, much more.

Exxcite at Rio – A Risque Burlesque: A product of producer Jennifer Romas, Exxcite is a new burlesque show that calls the Duomo Theater at Rio home. The production pays homage to the glitz & glam showgirl past of Las Vegas, tracking the progression of rock & roll and female sexuality from the 1950s to today.

Punk Rock Museum: The newest museum attraction in Las Vegas is dedicated to the history of punk rock. Inside, you'll find a collection of artifacts that include fliers, photos, instruments, handwritten lyrics, and more. Uniquely, there's even a hands-on guitar room, where visitors can play equipment once used by groups like Rise Against, NOFX, Strung Out, and more.

Escape "IT:" Based on the Steven King franchise, Escape IT is a new escape room concept that boasts 30 interactive rooms spread throughout the 30,000-square-foot complex that will include the Neibolt House, Derry Canal Days Festival, and the sewers below the town among others. Escape IT is a short drive from resorts downtown and on the Strip.

F1 Paddock and Year-Round Experience: Formula One's new paddock facility on Koval and Harmon is currently under construction and will house a year-round "fan experience" once complete. You can get a front row seat to construction of this new facility from the rear parking lot at the Tuscany Suites.

Bottom line folks: there's always something new to do in Vegas - and what's new caters to every imaginable taste. Enjoy!



**22nd National Advisors
Professional Development Conference
Sept. 18-20, 2023**

7:45 AM Sharp - Official Welcome – From Your Emcee for the Conference

Introducing Mike Englert BA, B.Ed., EPC - Founding CIEPS Faculty Member, CIEPS Compliance Officer

Between 1981 and 2002, Mike developed and marketed insurance and investment products, in both Canada and the United States, for such companies as Manulife, Canada Life and Royal & SunAlliance. During most of his career he focused on the ultra-affluent and 60+ market segments. In 2002, Mike and his wife Joan – both still in their forties and with young children at home – traded in their careers for what has proven to be a very comfortable retirement.

Mike is a founding member of both the Canadian and American Initiatives for Elder Planning Studies. He is an accomplished speaker who has spoken at hundreds of diverse events across both Canada and the United States. His talks focus on: the fiscal challenges of an aging population, the financial obstacles in the way of a healthy retirement, and the secrets to effectively marketing to and connecting with the elder population.

MAIN STAGE AGENDA FOR MONDAY, SEPTEMBER 18, 2023

MAIN PLATFORM PRESENTATIONS - Florentine C/D Room

8:00 - 9:00 AM

Building Bigger & Better: How Estate Planning Grows Your Business and Serves Your Clients

Presented by Daniel Collison

Sponsored by Advice2Advisors

What will the advisor learn from this presentation?

This presentation will appeal to the advisor who wants to increase their business by thinking like a top producer and offering their Estate Planning services to the wealthy Canadian demographic that they may not currently be servicing. Increased Business Development, Estate Planning, Professional Responsibility and Know Your Product skills will be an immediate and usable benefit of this presentation.

Presentation Overview

One of the best ways to tap into the HNW market is through Estate Planning. But estate planning is so much more than death and taxes. It's about the emotions, the psychology, the family and, critically, the legacy that your clients and prospects want to leave.

You can ensure the clients legacy with the Estate Planning process that you review with them and get wealthier clients at the same time.

In this presentation, Dan will show you how to:

- Supercharge Your Prospecting with Estate Planning
- Attract More HNWI Referrals and Introductions through Estate Planning
- Integrate Tax-Efficient Estate Planning into Your Practice
- Master the “Estate Planning Process”
- Learn the Art of Inter-Generational Wealth Transfer Strategies
- Gain Wealthier Clients with Estate Planning
- Learn to Monetize Estate Planning

Introducing Daniel Collison BA, CFP, TEP, Keynote Speaker, Author, Industry Expert and Managing Partner at Advice2Advisors

Daniel Collison has over 30 years in the financial services industry.

He is the co-founder and Managing Partner in the financial education firm Advice2Advisors, which trains, mentors, and coaches’ financial advisors of all tenures.

Dan is a CFP, TEP and has taught Personal Financial Management, in the MBA Program at the Schulich School of Business since 1998. He is also the author of *The Financial Advisor’s Guide to Excellence and Building Bigger & Better: Growth Strategies of Top-Producing Financial Advisors*.

Dan regularly presents keynotes and trains advisors across North and South America.

9:00 AM - 10:00 AM

Participating Life Insurance As A Liquid Asset

Presented by Alex Lekas BA Econ, CFP

Sponsored by iA Financial Group

What will the advisor learn from this presentation?

In this presentation, the advisor will learn that the death benefit of a life insurance policy is considered a liquid asset to the beneficiaries who successfully claim it. Once claimed, the payout is cash that can be used for any purpose. It’s no longer tied up in the policy, making it even more liquid than when the insured was still alive.

Presentation Overview

Alex will discuss and review Corporate Insurance needs, with respect to protecting the value of the business, reducing overall business taxes, while maintaining access to liquidity. He will also touch on overall estate planning, and which insurance solutions (from basic Term Insurance all the way to leveraged participating whole life) best suit the overall objective of the client.

Introducing Alex Lekas BA Econ, CFP Director of Sales iA Financial Group

Alex has been in the Financial Services Industry for 21 years. Upon graduating from the University of Western Ontario with a BA in Economics in 1997, he began his career in sales within the P&C division of the Co-Operators Insurance Company.

In 2001, he moved to London Life to become a Financial Advisor.

In 2006, he made the move to the independent broker network where he continued to grow his practice and became a CFP in 2010.

Alex accepted the position of Director of Sales with iA Financial Group in 2012. Since then, he has been busy forging new relationships with advisors and agencies.



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10:00 AM - 11:00 AM

The Positive Impact Of Adding Living Benefits To Your Portfolio

Presented by Robert Watson & Perry Wong CPA, CA

Sponsored by Combined Insurance

What will the advisor learn from this presentation?

This presentation will increase the advisor's knowledge, focusing on simple Living Benefit solutions that they can use with their clients and prospects during the financial retirement and estate planning strategy processes.

This product knowledge and positioning will contribute to the business development process for the advisor so that they are in a better position to protect their clients and prospects against any unexpected curve ball that life has a tendency to throw them.

Presentation Overview

This session will share our rich history, our mission and the impact of adding living benefits to increase your book of business.

Robert and Perry will address some unique solutions by using Living Benefits (other than traditional Critical illness and Disability Insurance) to protect your client's ability to pay their "bills" in the event of an accident or sickness.

They will discuss tips on how to increase your book of business by using the programs that you are licensed to sell.

Introducing Robert Watson Vice-President, Agency Divisional Manager, Achievers Division

Robert has over 36 years of experience in the financial services industry. This experience includes sales and leadership roles in agency distribution and group voluntary insurance across the country.

He is currently VP, Agency Divisional Manager, managing the Agency along with the broker channel.

Introducing Perry Wong CPA, CA

Perry Wong, a Chartered Accountant, seasoned Wealth Manager and enterprising Corporate Executive committed to reshaping the current insurance industry. Perry began his illustrious career in the financial service industry 23 years ago as a Chartered Accountant at one of Canada's prestigious accounting firms.

His ravenous desire to help the average Canadian family led him to pursue certifications in Wealth Management and Tax-Advantaged Investment Strategy. Using his vast experience as a Chartered Accountant, Mr. Wong proceeded to provide an unparalleled level of service within several of Canada's top financial institutions.

His relentless work ethic drove him to the pinnacle of the financial service industry where he did the unthinkable. He walked away from his storied career and struck a new path which would change the trajectory of thousands of lives.

In September of 2015, Mr. Wong officially joined a legacy insurer by the name of Combined Insurance. Seizing the virtually untapped need for "living benefits" in a market saturated by life insurance, Mr. Wong built the most prolific organization in company history.

On the road to national dominance, his team grew to over 180 licensed agents responsible for producing over \$4.5 million in annualized premiums since mid-2016. His organization holds the company record for largest APV production in a single week with over \$220,000.00. His personal success can only be compared to the abundance of accomplishments that his team members enjoy, with many of them 6 figure earners.

In addition to his impressive professional resume, Mr. Wong is a staunch family man who loves traveling with his wife and two beautiful children. He is also a proud former President of the Forest Hill Lion Club.

11:00 AM - 12:00 PM

Creating Client Conversations About Debt, Spending And Insurance Lending

Presented by Lysa Fitzgerald CFP & Victor Stranges

Sponsored by Manulife Bank

What will the advisor learn from this presentation?

In this presentation, the advisor will expand on their retirement, estate and financial planning strategies that can be used with their clients and prospects as another option to assist in establishing an insurance need that can be covered by using the advisors' recommended solutions for the problems that are uncovered.

Presentation Overview

Lysa Fitzgerald, Manulife Bank's Vice President of Sales, reveals the dramatic results of the latest Manulife Bank Financial Health Survey.

She will help you build important client conversations where you can explain why their debt and spending activities impact their ability to reach their overall financial goals.

The media generating survey that Lysa will reference, goes behind the numbers to better understand how Canadians feel about their debt, rising inflation and interest rates driving up the cost of living and the challenges of saving for the future.

One often overlooked asset that may help reduce financial stress is permanent insurance. It is more than just an estate planning tool.

Lysa will show you how insurance lending options can help your clients meet financial challenges today and throughout their retirement. Build stronger relationships and a stronger business with Manulife Bank... The Partners' Bank.

Introducing Lysa Fitzgerald CFP, Vice President Sales, Manulife Bank

Lysa Fitzgerald is Head of Sales for Manulife Bank and Trust. A member of Manulife Bank's Leadership Team, Lysa is responsible for the creation and delivery of a sales strategy that fuels the successful execution of the business goals. She works collaboratively with other Bank leaders and her Sales Leadership Team to drive retail and business sales growth through our advisor, broker and direct channels, and cultivates a high performing sales team where people build their careers and realize their potential.

Prior to joining Manulife in 2012, Lysa honed her deep financial and wealth management knowledge in several senior leadership roles at TD Bank. She has more than 25 years of private and business banking experience in the financial services industry, focused on high-net-worth clients. A recognized change leader, Lysa helped lead the implementation of a new business banking structure at TD Bank and has implemented several private lending pilot programs at Manulife Bank.

Lysa serves as executive sponsor of Manulife Bank's Diversity and Inclusion committee and was one of the founding chairs for Manulife's Global Women's Alliance (GWA) Kitchener/Waterloo/Oakville chapter. Lysa earned a Bachelor of Arts from the University of Western. She has also been a Certified Financial Planner (CFP) since 2004.

Introducing Victor Stranges Head of Private Banking

With more than 25 years of experience in the financial services industry, Victor brings a long history of expertise to his position as National Head of Private Banking.

Victor's extensive banking experience has focused on commercial and personal lending with a strong record of meeting the needs of high-net-worth clients. During his time at Manulife Bank, Victor held senior leadership roles including Head of the Bank's Credit Department and AVP, Business and Personal Lending Services. Prior to joining the Private Banking team, Victor has held the role of National Director, Business Banking which was focused on growing sales of Insurance Leveraged strategies and commercial mortgage financing.

Victor earned a Bachelor of Business degree from York University.

As a sports enthusiast, Victor enjoys participating in team fundraisers for a variety of causes. Victor lives in Mississauga with his wife and their daughter.

12:00 PM - 1:00 PM

5 Sure Fire Ways To Get More Prospects And Appointments, And How to Sell Your Products Like Van Sells His!

Presented by Jim Ruta & Van Mueller

Sponsored by Advisorcraft Media & SOLIS

What will the advisor learn from this presentation?

In this presentation, the advisor will build on their practice management & business development skills through conversation and case studies.

When this foundation of the advisor's financial advising skills are in place, the advisor can then provide estate, financial & tax planning solutions to their prospects and clients by recommending the proper insurance solutions.

The ideas and concepts covered in this presentation will be useful to either the insurance or investment advisor.

Presentation Overview

Van Mueller has 35 to 50 sales meetings each week, 8 months of the year, year in, year out. Ever wonder how he does it? Would it be beneficial for your business if you could use the same approach to even double or triple the appointments you get? What would that mean to you financially?

Jim Ruta and Van Mueller are back! Not with a presentation of WHAT you can do to get more prospects and meetings but an explanation of HOW you can do it. This is the beginning of the "Know Your Client" process that will lead to the financial, estate and retirement planning , so that you can establish the need and solve the problem with the products you can market.

Like Van says, we don't have a sales problem, we have an appointment problem. More appointments obviously mean more sales and Jim has deconstructed Van's approach to show you HOW you can get them too. Van will explain the 5 ways he uses to generate a ton of prospects as well as having them calling him. That's why he is always 100 appointments behind and never at a loss for someone to see. The great thing is that you can use his approach in your business to get many more appointments than you are getting today – and drive up your income.

As an added bonus, Jim will explain the sales strategy Van uses so that you too can squeeze more appointments in a day. It's what Jim calls "The Simple Sales Success Pyramid" – it's compliant and compelling at the same time.

Imagine... He'll explain it and show you how Van can get a sale in 15 minutes or move on. Less time per appointment means more possible appointments. It's how Van can SHOW his ideas to more people every day and YOU CAN TOO. It's such a simple approach that anyone can use it and have more meetings and more sales each week.

Finally, as the ultimate bonus, Van and Jim will do a breakout session for your questions on prospecting or any sales strategies, case studies or practice management issues, that pertain to your estate, retirement or overall financial planning processes.

This is a program that you'll never forget.

Introducing Jim Ruta BA, RHU, EPC

Jim Ruta is President of Advisorcraft Media and a tactical sales coach, helping life insurance agents maximize their performance. He has spoken four times at the MDRT Annual Meeting, including on the Main Platform, has written four books and is a regular columnist in industry magazines. His crusade is to preserve, promote and propel the noble profession of selling life insurance.

Jim's Advisorcraft Masterclasses and unique Power of Platinum mentoring and coaching program draw hundreds of people from around the world.

He is also the principal of SOLIS - School of Life Insurance Selling, featuring the sales secrets of world-class advisors, and is the co-founder and host of the Canada Sales Congress in Toronto, the largest one-day life insurance sales event in North America.

Introducing Van Mueller LUTCF, LACP, Registered Representative

January 23, 2023, marked Van's 50th year as a life insurance agent. He is an active member of MDRT having qualified for Court of the Table in 1990 and Top of The Table for the last 33 years.

Van was awarded the Milwaukee NAIFA Distinguished Service Award for 2003. And in 2010 Van was the proud recipient of the A. Jack Nussbaum Distinguished Service Award for NAIFA – Wisconsin.

He has also qualified for the National Sales Achievement Award, the National Quality Award, and the Health Insurance Quality Award. In addition, he has qualified many times for the National Association of Health Underwriters Leading Producers Round Table. Van was selected by Senior Market Advisor Magazine as the 2010 Advisor of the Year.

Van supports many industry organizations. In addition to membership in the National Association of Insurance & Financial Advisors and Million Dollar Round Table, he is also a member of the Society of Financial Service Professionals, an Emissary Contributor to IFAPAC and a Diamond Knight of the Million Dollar Round Table Foundation. Van has spoken to groups around the world, including being main-platform speaker at MDRT in 1998 Chicago and the Main Platform speaker at the 2001 Top of The Table Meeting Maui, HI. Van was a Main Platform Speaker at the 2003, 2005, 2009, 2014, 2015, 2016 and 2017 NAIFA Conventions. He was a speaker at MDRT and at the NAIFA Convention for 2006, and again in 2007, 2010, 2011, 2018, 2019 and 2020. He was a main platform speaker for the MDRT Experience in Tokyo, Japan in April of 2008.

He has written many articles for various publications, including “The Close” for Retirement Advisor magazine. Van has a web-based monthly newsletter subscription that many agents find an invaluable resource for their practice. Van believes that the next decade will be “The Greatest Time Ever” for Insurance and Financial Service Professionals!

BREAKOUT AGENDA FOR MONDAY, SEPTEMBER 18, 2023

Breakout # 1

2:00 PM - 3:00 PM MAIN MEETING ROOM - FLORENTINE C/D

The Impact of Living Benefits on the Financial Security of Your Clients

Presented by Monica Fortney & Perry Wong CPA, CA

Sponsored by Combined Insurance

What will the advisor learn from this presentation?

In this presentation, the advisor will learn how adding living benefits and supplemental insurance to their client’s portfolio can positively impact their financial security.

Presentation Overview

Currently the Insurance Industry landscape is extremely limited. There is a vast variety of Life Insurance products from many insurance providers. However, there is very few choices available to financial advisors in the Living Benefit landscape. Most advisors are not actively offering disability due to income qualification issues, long waiting periods and occupational rating and restrictions. Critical illness insurance is primarily offered to young, healthy individuals with healthy family medical histories.

There is a real need for the new and innovative living benefit products that Combined Insurance can provide.

This presentation will address the following living benefit solutions:

Accident and Sickness Insurance

- No Income Proof: No job required for coverage
- No waiting periods
- No occupational restrictions
- Issue age: 6 months to age 69
- Coverage to age 85
- Family coverage available: Protecting existing and future children

Lump Sum Critical Illness Insurance

- Level cost of insurance
- Lifetime coverage (issue age 18yrs to age 70)
- Partial payment for certain non-life-threatening cancers, with benefit eligibility available for a second condition.

Cancer Care Insurance

- Preferred rating for individuals even if there is pre-existing condition of Cancer, Stroke, Heart Attack or Diabetes
- Family coverage available: Protecting existing and future children.

Introducing Monica Fortney, Agency Director, Combined Insurance

Monica Fortney joined Combined Insurance in April 2012 and now has over 11 years of experience in the financial services industry. Based on her performance with the company she was able to fast track in her career as an independent contractor to a sales executive. In her current role as Agency Director, she is responsible for developing and executing agency growth in both sales and acquisition. Monica manages a team of over 210 advisors from various provinces across Canada mainly in Ontario and British Columbia.

Under her leadership, the agency has achieved many milestones both in team sales and recruitment. Prior to joining the insurance industry, she completed her four-year mathematics degree at Nipissing University.

Introducing Perry Wong CPA, CA - Please refer to Perry's bio listed in his main stage presentation.

Breakout #2

2:00 PM - 3:00 PM FLORENTINE B (ROOM BEHIND STAGE)

Why People Don't Buy Insurance...and What to Do About It.

Presented by Daniel Collison BA, CFP, TEP

Sponsored by Advice2Advisors

What will the advisor learn from this presentation?

Getting basic life insurance in place is not necessarily the most thrilling thing your clients and prospects will ever do in their lives, but it can be one of the most important decisions that they will ever make.

In this presentation, the advisor will hear Dan discuss why people DON'T want to talk about death, talk about estate planning, buy life insurance, or talk to you, the Insurance Advisor.

At the end of this session, you will come away with a new vision consisting of concepts and solutions on how they can start the financial planning process that will lead to actionable results for the client or prospect.

Presentation Overview

In this session the advisor will take away ideas on:

- How to overcome death anxiety
- How to overcome estate planning anxiety
- How to create "symbolic immortality"
- How to turn insurance planning into risk management
- How to ask the "right" questions that help your clients and prospects make better decisions

You will leave this session with a renewed focus and vigor towards satisfying your clients' needs and wants, while building a bigger & better business!

Please refer to Dan's bio listed in his main stage presentation.

Breakout #3

3:00 PM - 4:00 PM FLORENTINE C/D (MAIN MEETING ROOM)

Corporate Insurance Concepts: Insurance for Business Owners

Presented by Qayam Lalji BSc

Sponsored by iA Financial Group

What will the advisor learn from this presentation?

In this presentation, the advisor will learn that life insurance solutions available for corporate business owners are fundamental to protecting their family, business interest and continuity. Business owners have the option of owning life insurance policies personally or inside of their corporation.

Presentation Overview

Qayam will address the following as it pertains to corporate insurance concepts:

- The CDA
- Effects of the CDA on net estate values
- Keyperson and Buy Sell insurance
- A general look at taxation of corporate and individually owned policies
- And more...

The use of case studies will be used during this presentation to illustrate the various concepts.

*Introducing Qayam Lalji BSc Director of Sales, iA Financial Group,
Ontario Individual Life*

Qayam has been working in the insurance industry for over 21 years. He started with HB Group Insurance in 1997 after completing his BSc. in Mathematics and Economics.

In 2015 Qayam moved to iA as part of the Sales and Marketing Team as a Marketing Associate and now holds the role of Director of Sales, Ontario. His success is the result of a deep passion for protecting client's families as well as building wealth and strong relationships with the advisors he works with.

In his spare time he enjoys playing soccer and hockey and most importantly, spending time with his family. He resides in downtown Toronto with his wife, Zubeen and two young children Ayanna and Qayz.

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Breakout #4

3:00 PM - 4:00 PM FLORENTINE B (ROOM BEHIND STAGE)

How To Build, Operate And Transition To A Successful Advisory Practice In Today's Ever-Changing Environment

Presented by Chris Boyle

Sponsored by Legacy Financial Group Ltd.

What will the advisor learn from this presentation?

As financial advisors we all have challenges when dealing with our clients and prospects. More and more is expected of us than ever before. How do we keep up with these challenges?

In this presentation, the advisor will learn how to create a better work life balance, build and grow a sustainable practice and find options on how to maximize the benefit when they decide to transition or sell their practice.

Presentation Overview

Clients often develop strong bonds with their financial advisors because of the personal nature of the information they share. However, there may come a time when a longstanding advisor is considering a hand off of their clients to a colleague, as they prepare to enter the next phase of their life...retirement or stepping back from the business they built as they consider succession planning for their block of business.

This can cause anxiety for clients, who may be wondering how to rebuild that same rapport and trust with a different advisor or company.

Customer relationships trump marginal profits and savings differentials more often than not. If a financial services advisor or company wants to maintain a more predictable revenue stream that will bring the best return for their years spent building their businesses, it must have a solid succession planning system in place.

In this session, Chris will address the following issues:

- Challenges the industry is facing
- Challenges advisors face
- What makes your business valuable for sale or transition?
- How you can build a more profitable practice and how partnering with Legacy Financial Group LTD can help you.

Introducing Chris Boyle

Chris Boyle is Founder and CEO of Legacy Financial Group LTD. He has over 16 years' experience in the financial services industry including insurance, public and private markets, and also was a compliance officer for a private equity firm.

Through his experience he realized that the financial services industry in Canada needs some disruption.

Legacy Financial Group LTD is a company that is changing the experience both clients and advisors have in our industry. This includes increased transparency, compliance shift and work/life balance to name a few.

Chris is a father of 3 girls, a sports fan and loves to cook.

Breakout #5

4:00 PM - 5:00 PM FLORENTINE C/D (MAIN MEETING ROOM)

The Van and Jim Advisor Development Hotseat – 100 Years at 100 Degrees

Presented by Jim Ruta BA RHU EPC & Van Mueller LUTCF, LACP

Sponsored by Advisorcraft Media & SOLIS

What will the advisor learn from this presentation?

In this presentation, the advisor can take advantage of over 100 years of high-end business experience all around the world to make you and your business shine brighter and become more profitable in the process.

This is a follow up segment from the morning and is dedicated to helping you develop the most important part of your business, building your estate, financial and retirement planning processes with your clients and prospects.

Presentation Overview

Jim and Van will answer these questions for you:

- Do you have some pressing practice management questions you want answered?
- Do you have a business idea on which you'd like to get a professional opinion – say from one of the world's top agents and his coach?
- Maybe you aren't doing all you want to, and you'd like an idea on getting unstuck? Are you a little short of new people to talk to?
- Would you like to know how to mine your existing book of business so you can help more people?
- Would you like to polish up your insurance portfolio review process?
- Are you looking for a sure-fire way to get centers-of-influence to work for you?
- Would you like to know how a concept approach to your business can elevate your results?
- Is there anything at all that's bugging you and holding you back?

You're in luck. Van Mueller and Jim Ruta will be on the Hotseat in Las Vegas answering all your questions at their expense? We hope you will join us.

Please refer to Jim & Van's bio listed in their main stage presentation.

Breakout #6

4:00 PM - 5:00 PM FLORENTINE B (ROOM BEHIND STAGE)

Creating Extraordinary Wealth For Ordinary People. Double Insurance Sales By Attracting Real Estate Investors?

Presented by Christian Dy B.Sc., B.Ed., MA, MBA

Sponsored by Latitude West Financial

What will the advisor learn from this presentation?

Buying and owning real estate is an investment strategy that can be both satisfying and lucrative, but it is not for all your clients and prospects.

The advisor will leave this presentation with a better understanding of how real estate investments can add diversification to your clients and prospect portfolios just like the other investments that you have in place for them.

They will learn that a real estate asset is subject to different influences, more than stocks and bonds, segregated funds, RRSPs etc.

The advisor will see the benefit of establishing a goal with the client to perhaps add a passive income stream while they assist with managing their other insurance and investments as well as an estate plan for any tax implications through the use of insurance products.

Presentation Overview

A financial advisor will learn about the clients financial goals and devise a plan to help them attain them.

When looking for investment options for your clients and prospects, there are many choices for where to put their money. Stocks, bonds, exchange-traded funds, mutual funds, and investing in real estate are all good investments that should be considered.

But for many Canadians, the majority of their wealth is held in personally owned real estate. Due to the nature of real estate, it is important to utilize financial & estate planning to realize optimum gain and minimize tax implications.

In this presentation, Christian will discuss the following:

- Avoid the top 3 mistakes insurance advisors do that limit their sales
- Uncover additional insurance needs with your client's real estate investments.
- Add value by teaching clients how to break their wealth ceiling.

Introducing Christian Dy B.Sc., B. Ed, MA, MBA

Christian is an award-winning educator, team leader, and financial advisor.

When Christian took over his father's business, he not only gained 40 years of experience but also brought his desire for helping his clients invest in real estate.

He realized that traditional financial advisors were only focusing on wealth in the stock market, which went against his philosophy of growing wealth.

His practice is now focused on working with clients who want to build their financial wealth in the real estate market. This is achieved with an integration of stock assets, combined with active and passive real estate investments.

His team can not only do traditional financial planning for clients but will also analyze and present new cash flowing real estate deals across Canada/US.

Christian has created a unique service for clients, incorporating real estate consulting to addressing their traditional investments. His new book (Breaking Your Wealth Ceiling) to be released soon, teaches clients how to break their wealth ceiling by investing in cash flowing assets, such as real estate. His practice entails a fee for service, which has doubled his insurance sales over the past 2 years, while creating exponential wealth for his clients.

When Christian is not advising clients or giving financial workshops, he can be found analyzing real estate investments, creating financial education videos for his YouTube channel, and volunteering locally and abroad with his philanthropic projects.

Some of Christians recent awards:

- Awarded the Outstanding Educator Award from the BCAMT Association
- Ranked as the Top Living Benefits Advisor for PPI BC
- Presently Ranked Top 1% of Living Benefits Advisors for PPI BC

MAIN STAGE AGENDA FOR TUESDAY, SEPTEMBER 19, 2023

7:45 AM Sharp

Program starts with your MC - Mike Englert BA, B.Ed., EPC – Founding CIEPS Faculty Member, CIEPS Compliance Officer

8:00 AM – 9:00 AM

Mastering the Art of Building Your Business

Presented by Raymond Young

Sponsored by LMI Financial Group

What will the advisor learn from this presentation?

This presentation will address the issues of practice management and building business development skills by providing proven ideas on how the advisor can build their business operation through bringing on good advisors and at the same time enjoying the increased income this would provide.

Presentation Overview

The financial industry is changing on an ongoing basis. Is your financial services business changing with it?

According to Deloitte, over the previous two years, the financial services industry has demonstrated its ability to successfully navigate unprecedented levels of uncertainty.

From insurance to investment management, financial services organizations across the globe faced the pandemic with remarkable resilience and adaptivity, helping people, organizations, and governments get back on their feet.

The past couple of years have seen a situation where advisors thinking about retirement 5 years from now, are now looking at retirement more seriously or beginning their succession planning much earlier than anticipated.

Some of the reasons for this are that many financial services companies, MGA operations etc., were bought and sold, or maybe some of your advisors just decided that this was not the profession for them. Or some just decided to leave.

You might be looking for larger corporate profit margins, but at your current capacity, you are unable to reach those goals due to many factors.

As a result of these and other circumstances, how are you going to replace the advisors you lost or bring on new advisors who have the same vision as you?

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Hour Bank Plans

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Your financial services business can be poised and ready to move forward by bringing on the right individuals.

During this presentation, Raymond will provide an all-encompassing overview of mastering the art of effective business building through the hiring of additional advisors.

Raymond will also cover the following points when looking for the right advisors for your firm:

- How do you effectively explain the industry to the “new person?”
- How to improve your corporate branding
- What are the licensing requirements?
- What are the regulatory and due diligence requirements?
- How do you effectively manage lead lists?
- How do you manage Do Not Call lists?
- Employ marketing strategies that work
- How to expand your sourcing strategies by using social media etc.
- How do you master the art of referrals?
- And finally, providing mentorship and continuing training and education so that the new advisor thrives

Introducing Raymond Young

Raymond Young has been an entrepreneur his entire life. Starting out as one of the youngest concert promoters in Canada at the age of 16, a multi-location gas station owner by the age of 25, and a record-breaking insurance broker by his early 30s, where he successfully grew his sales & marketing agency to 450 licensed representatives, becoming the #1 agency in Canada within his organization.

During his seventeen-year career, he also became a professional life coach and success mentor to his organization.

With a passion for leadership and mentorship, Raymond stepped away from financial services to create an outlet where he could reach out to more people than just those interested in improving their financial situation. As a result, Raymond launched his own company, We R Leadership & Consulting International; a company with a vision to inspire, enhance and provide tools for effective change and growth of individuals and organizations around the world; to significantly increase their performance potential.

With Raymond’s passion for helping others, creative problem solving and mentorship skills, he knew he could help entrepreneurs grow and improve their business from any industry, and as a result he started Lifestyles Management Inc, business solutions specialists in 2018. Raymond’s natural leadership skills and ability to connect with people, as well as extensive entrepreneurial and financial services experience naturally led to the creation of LMI Financial Group, with a new, younger team of financial service professionals ready to make waves in the industry.

Raymond credits his success to learning how to keep moving when life stops. His father played a huge role in his success thinking; he held on to something his father said at a very young age: “things don’t happen, people make things happen”, hence a forty-year career as an entrepreneur.

Raymond's unique edge as a coach is his authentic nature, and always speaking from the heart, never scripted. His transparency allows individuals to relate and know that it is possible for them too to create similar successes in their lives. Raymond has always walked the talk, never preaching about something he hasn't already experienced. His passion is mentoring and helping others to find their own path to success.

9:00 AM - 10:00 AM

Retirement Planning – Diversify Your Approach to Maximize Results

Presented by Ayal Alalouf & Zainab Sheikh

Sponsored by Canada Protection Plan (a Foresters Financial Company)

What will the advisor learn from this presentation?

This presentation provides strategies advisors can use to help their clients diversify their retirement savings plan with life insurance while looking at current trends and challenges.

This presentation will educate the advisor with further knowledge that will help them with their retirement, estate, financial and living benefit planning systems that they currently use with their clients and prospects.

Presentation Overview

Life insurance is positioned as a complement to other saving vehicles such as Registered Pension Plans, Registered Retirement Savings Plans, Private Pension Plans, and Tax-Free Savings Accounts. The tax advantages of this diversified approach are detailed.

The presentation will also show how critical illness insurance can help protect retirement savings from the financial impacts of a serious illness. A case study will be used to highlight key sales strategies.

And finally, Ayal will review the complimentary member benefits your clients will get just by owing a policy (\$10,000 in scholarships for children & grandchildren, \$10,000 in grants to help your community, free will & power of attorney documents, free online courses, and more!)

Introducing Ayal Alalouf VP of Sales, Ontario

Ayal got his start in the insurance industry in 2004 with Freedom 55 Financial. During his first three years, he assisted 250 families with their insurance & investment needs.

He accepted a position with Canada Protection Plan in 2006 managing their Call Centre. In 2012 he became the Regional Vice President for Ontario helping advisors & MGAs with securing coverage for all Canadians.

In 2022, Ayal supports 3 Ontario RVPs in his role as VP of Sales in Ontario and supports advisors & MGAs with both CPP & Foresters product shelves.

Ayal enjoys sports, loves spending time with his university aged twin girls, and is always up for a poker game.

Introducing Zainab Sheikh

Zainab is the Regional Vice President for Ontario at Canada Protection Plan, a Foresters Financial Company.

With over 15 years of experience in the financial services industry, Zainab provides strategies, solutions, coaches advisors, and collaborates with MGA partners to our one common goal - achieving success! Zainab is passionate about her community and giving back, which is why she loves the complimentary member benefits the company provides to all policyholders.

10:00 AM - 11:00 AM

The NEW conversation about Money, Wealth and Worth

Presented by Richard Dolan

Sponsored by Financial Life Professionals

What will the advisor learn from this presentation?

This presentation is designed to provide the advisor with an in-depth financial and estate planning perspective. The advisor will leave this presentation realizing that there is more to the planning process than just paper and ink.

Business development skills and enhanced client relationships are guaranteed to increase! When this happens, it becomes a win/win for both the advisor and the client.

Presentation Overview

“Richard has designed a new conversational context that will shake up and powerfully serve financial professionals and investors seeking to secure their financial life and legacies.”
- FORBES

Given the nature of intergenerational wealth transferences along with the cross pollination of multi-generational thinking when planning and strategizing for long term wealth protection and performance, a new conversation is emerging. One that crosses new values, new views and a new vision for family wealth over time.

Richard has has been researching areas such as behavioral finance, happiness economics and investor resilience to develop his own Urban Financial Life Philosophy that lives at the core of new theories, applications, education and conversations that will empower, embolden and engage clients in a far more meaningful and impactful way.

Attendees will learn more about:

1. The NEW Urban Financial Life Philosophy
2. The NEW tools for Financial professionals
3. The NEW opportunities that emerge through the shift in conversation and
4. The expanded realm of revenues and referrals that can be generated as a result of implementing this proven approach and attitude

Introducing Richard Dolan, Author of *The Financial Life Professional Program and Curriculum*

Richard Dolan is a 30-year veteran within the wealth management realm.

From building significant books of business personally, to playing various and vital roles with manufacturers attracting more than a billion dollars in assets under management; Richard possesses a rich and successful history among financial planners, investment advisors and private wealth managers as a business coach, advisor, and educator.

He is the author of publications about money, wealth and worth - leveraging his background in research areas such as behavioural finance, happiness economics, and investor resilience. He designed and delivered academia at the Executive Development division for Schulich School of Business (York University) having designed, authored, and led two certificate programs on Wealth Management and Marketing Wealth Management Services.

He has worked with global banking brands such ING, Scotia Bank, HSBC and Societe Generalé, as well as iconic consumer brands such as Pagani Automobili, BMW, Bentley Motors, Chanel, GQ Magazine, Dragons' Den, Rémy Martin, and Virginia Black Whiskey and more.

He resides in Toronto. For more information on Richard please visit his website www.RichardDolan.com.

11:00 AM - 12 PM

Critical Illness As A Retirement Strategy And Introduction To The Shared Ownership Concept

Presented by John Thanos, Living Benefits Sales Director

Sponsored by iA Financial Group (Living Benefits Division)

What will the advisor learn from this presentation?

A critical illness diagnosis during retirement could have a serious impact on your clients' retirement savings and income plans.

In this presentation, the advisor will learn that individuals, as well as business owners must, to the best of their ability, constantly identify and control risk factors which may threaten the success of the individual's lifestyle or their businesses future.

They will learn that shared ownership of critical illness insurance can be a sound business strategy!

Presentation Overview

This presentation will provide the answer to the question, "Can Critical Illness insurance be part of a retirement financial plan?"

John will provide some insight by discussing the following:

- Why critical illness?
- Critical illness as retirement insurance
- The stats support the need for ci
- The emotional cost of recovery
- Why do advisors not sell living benefits?
- Re-framing critical illness discussion: retirement insurance
- Case study
- An introduction to the use of a shared ownership option of owning the ci policy

Introducing John Thanos, Living Benefits Sales Director

John Thanos is the Living Benefits Sales Director for iA. He works closely with advisors and brokers across Ontario to help implement and promote living benefits as an integral component of a well-rounded financial plan.

John began his career in the financial services industry over 20 years ago and joined iA in 2015. He is an excellent source of information regarding iA's living benefits products and services. His experience offering sales and marketing ideas have helped brokers expand their book of business and increase personal production. His goal is to offer simple and effective insurance solutions to help Canadians prepare for their future and to be protected against the uncertainties of life.

John has successfully completed his IFIC Mutual Funds course, the OTL Insurance agents license, the LLQP and is currently working on his Certified Health Specialist (CHS) designation. John enjoys sports, traveling abroad, going to the cottage and has a unique hobby in producing holiday pyrotechnics shows for friends and family.

12 PM - 1:00 PM

The Life Insurance Business and You! If I knew then, what I know now!

Presented by Don Xavier

Sponsored by Don Xavier Academy

What will the advisor learn from this presentation?

This presentation will help the advisor build their business through the use of increased practice management, business development, and managerial skills.

The advisor will be in a much better position to provide the many products, solutions and services that they are licensed to sell.

The bottom line of this presentation is for the advisor to solve the prospect and clients' problems by implementing the insurance protection they need for themselves, their families and for any businesses they might own.

Presentation Overview

The two most important days in a life insurance career are:

1. The day you get licensed and
2. The day you discover your true purpose

We can learn from the mistakes of others, so it follows that we can certainly learn from the successes of others as well.

As financial advisors, we all must discover our purpose. This is to focus your energy on helping individuals, families, and business owners achieve peace of mind and security through holistic financial and estate planning.

Ask yourself these questions - Are you already motivated and need some great time-tested ideas to put into motion? Are you looking for that one great idea that could potentially change your life and your business?

If your answer be yes, then this high-energy presentation by Don Xavier is for you!

Think about this...Your life insurance license is much more than just a piece of paper. Your life insurance license is a way that you will print money for your clients and at the same time reap the financial rewards when you do the proper job for the clients.

Don has been blessed to work with some of the very best advisors and sales professionals in many parts of the world for the past 36 years, sharing how to alter their conditioning and change their habitual way of thinking and behaving to achieve their very best in life and business.

Don's objective is to educate people by utilizing his personal experiences, and successes with strategies for permanent, positive, lasting change.

His super-awesome attitude is to transfer concepts, enthusiasm, as well as positive energy and influence on as many people as possible today, so that they implement the insurance protection they need for themselves, their families and for any businesses they might own. When this happens, they become clients, and without clients, you do not have a future in the life insurance business.

Don will cover the following things that are necessary to succeed and build a strong insurance business:

- Be accountable for your time and avoid procrastination
- Be ethical and compliant in all that you do
- Ownership of your business from day one
- Continue training, get new ideas and concepts, and use mentors to help you get the success that you deserve
- Systems and standard business process that is – reliable, duplicatable, scalable, and a consistent way to bring new potential customers into your business daily.
- Opportunity to grow by building and becoming a business owner *if* desired
- Professional and motivating environment to conduct business
- Building your business to position it for your ultimate succession planning opportunity when you decide to retire

It is a good thing to remember that not all the above suggestions will work with all financial advisors, so implement the ideas that will work for you and your business.

Always treat your business like a business. Work harder than you would at a job and acquire focused relevant education, such as compliance, new ideas, strategies, products, technology, features, benefits, contractual commissions, and renewals.

If you've been in the business for a few years or just starting out in life insurance and investment industry, you've made a good choice of profession to be in.

Introducing Don Xavier Author | Speaker | Sales Content Creator | Advisor | CEO at VFG Financial Group & Don Xavier Academy

Don began his career in the financial services industry in 1987 with Mutual of Omaha as an agent knocking on doors. Since then, he has held many progressive positions such as District Manager, General Manager, Vice President of Training & Development, and President & CEO, followed by building two successful MGAs with over 700 contracted advisors and owning a Mutual Fund Branch. He has written 4 Canadian best-selling self-help books:

- Motivational Cycles to Successful Selling
- Unleash the Magnet in You
- Liberta o Seu Magnetismo Interior (Portuguese)
- How-to Remove Your Success Blockers

Don also authored the Inspirational Sales Management Mastery Program titled, Boost the Value of Your Business. His ideas, principles, techniques, and real-life examples are inspirational and can be implemented by anyone, in any industry, immediately.

He aims to help people alter their conditioning and change their habitual ways of thinking and behaving to achieve more success in life and business.

Since 1999 Don has spoken to thousands of people and business professionals in many countries including, Canada, USA, Caribbean, Europe, Africa, and Cabo Verde Islands.

Don's clients include TED Talk, Triple 7 Real Estate, Cabo International Partners, Pro-Seminars, Advocis, Industry Events, MGAs, AGAs, Mutual Fund Dealers, Insurance Companies, Schools, MLMs, the General Public, Governments, Rotary Clubs, Churches, and Company sales professionals.

Don turns every engagement, in-person or online, into a compelling learning experience. Daily, he strives to transfer enthusiasm, and positive energy to positively influences as many people as possible.

He lives by the saying, "Begin every day with Determination and end every day with Satisfaction!"

To check out Don's areas of expertise, please visit his website - www.DonXavierAcademy.com. He will customize the right program to thrill and delight your associates.

Call Don today at 416.562.9780 and talk about how he can help your people create breakthroughs together. He looks forward to your conversation.



Since 1999, Don Xavier has been educating financial professionals across Canada on mindset conditioning, products, strategies and sales.



seminars



workshops



coaching



ce credits



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BREAKOUT AGENDA FOR TUESDAY, SEPTEMBER 19, 2023

Breakout #7

2:00 PM - 3:00 PM FLORENTINE C/D (MAIN MEETING ROOM)

Disability Tax Credit and the RDSP

Presented by Peter Curtis

Sponsored by Benefits2

What will the advisor learn from this presentation?

Financial advisors have a tremendous opportunity to help provide Canadians affected by disability with a secure financial future by introducing Registered Disability Savings Plans (RDSPs) into their financial plans. Understanding the benefits of an RDSP offers individuals the ability to provide financial security for those who might be dealing with either a cognitive or physical disability or are caring for a family member with cognitive or physical disabilities.

In this presentation, the advisor will leave with a better understanding of the DTC and how to help parents and others save for the long-term financial security of a person who is eligible for the disability tax credit (DTC).

Presentation Overview

The RDSP is an underused option to grow your book and fully service your current clients. The DTC is the mandatory eligibility requirement for the RDSP.

In this session, Peter will speak about what constitutes a disability as the “traditional” definition no longer applies. He will discuss the DTC and its criteria as well as how to introduce this to your clients and potential clients.

The purpose of this session is to share how as an organization we shifted our mindset and in turn, shifted our processes to help our senior customers and their families navigate retirement living options and share best practices for use in other organizations facing similar challenges.

Introducing Peter Curtis

Peter Curtis is a paralegal in Ontario with a practice focus of the Disability Tax Credit. With over 20 years of medical law experience Peter and his staff have represented thousands of DTC clients and have a success rate of over 98%.

Denied applications, clients without doctors and difficult files are all welcome to have a free consultation.



Separate yourself from the crowd.

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Breakout #8

2:00 PM - 3:00 PM FLORENTINE B (ROOM BEHIND STAGE)

Simplifying Your Business With Foresters' Online eApp - InsuranceAssist

Presented by Ayal Alalouf & Zainab Sheikh

Sponsored by Canada Protection Plan (a Foresters Financial Company)

What will the advisor learn from this presentation?

In this presentation, the advisor will learn that through customizable products, one-on-one sales support and the opportunity to make a positive impact, it's easy to grow their business effectively.

Presentation Overview

Foresters Financial™ has partnered with Now Solutions Group to provide advisors with a non-face-to-face sales process that is fast and simple. Now Solutions InsuranceAssist platform gives advisors the ability to connect with their clients via telephone and an internet browser to complete a secure online application for insurance from Foresters.

This presentation will inform and educate advisors on InsuranceAssist and its process for submitting online applications.

It's a fast and simple sales process and we will show you the benefits of using InsuranceAssist.

Please refer to both of their bios from their main stage presentation.

Breakout #9

3:00 PM - 4:00 PM FLORENTINE C/D (MAIN MEETING ROOM)

90 Day Blitz: A 90 Day Action Plan to Grow Your Business

Presented by Raymond Young

Sponsored by LMI Financial Group

What will the advisor learn from this presentation?

Are you serious about growing your business? If you are, then this breakout session will benefit you greatly!

During this presentation, Raymond will show the advisor that during the next 90 days, their sole purpose is concentrating on new business development and growth. You are mainly concentrating on targeted, business-building activities during that period of time.

This is not necessarily an easy task because you will be challenged by distractions. However, this is the time you are committing to intentionally propelling your growing business to new heights.

By the end of this practice management breakout session, you will learn how to formulate a 90-day action plan to move you and your business forward. But, of course, no business stands still and so you'll want to return to what you have taken out of this session and review your business growth again and plan the next 90 days until you get the growth you want to achieve.

Presentation Overview

Raymond will cover the following points:

- A step-by-step guide to growing your business, overcoming your obstacles and achieving those goals in 90 days

- He will share the tools to make you unstoppable as you build momentum in your business
- You will learn about the “tried and true” results systems that Raymond has used for years to build his businesses
- You will learn about keeping a workable infrastructure in place to keep things clean, sustainable, and profitable

Please refer to Raymond's bio from his main stage presentation.

Breakout #10

3:00 PM - 4:00 PM FLORENTINE B (ROOM BEHIND STAGE)

***Improving your Estate Planning Offering with a Multi Disciplinary Team Approach
“The whole is greater than its sum of its parts.”***

Presented by Dale Barrett & Dom Coluss

Sponsored by Barrett Tax Law

What will the advisor learn from this presentation?

Financial advisors have a significant opportunity to help themselves and Canadian Business owners bridge the gap before the largest intergenerational wealth transfer by locking in their shareholder value and maximizing the value of their Estate.

Understanding the benefits of “Purifying your Corporation” to access the Lifetime Capital Gains Exemption, multiplying the exemption through the proper use of Estate Freezes, and planning well in advance with post-mortem concepts will help to avoid DOUBLE and, in some cases, even TRIPLE taxation.

Presentation Overview

In this presentation, the advisor will leave with a better understanding of Corporate Reorganizations and how to position best practice planning strategies to enable you to achieve lifetime financial security by keeping more of what's yours, for you, your family and businesses.

Optimizing the efficiency of your Corporate structure for business continuity and succession planning is often overlooked and put on the back burner. With a better understanding of these topics and key strategies working together towards a tailor made fit will be the best way to lock in your shareholder value today with more certainty and confidence that your family and clients will be well taken care of.

Dale and Dom will use case studies on Business Exists and Tax Plan Considerations by leveraging the value of working together to establish and lock in your shareholder value for business continuity and succession planning by adding the right team, providing the best solutions and reliable access to Advisor and client service support.

Introducing Dale Barrett

Dale Barrett is the founder and managing lawyer of Barrett Tax Law and Lawyer & Lattes. He is a #1 Best Selling Author of Tax Survival for Canadians: Stand Up to the CRA, the Quick and Dirty Business Start-Up Guide, Victory Over the CRA: An Accountant's Guide to Representing a Client and Pay Way Less Tax!

A frequent Speaker, Tax Columnist for the Lawyer's Daily and Editor of the Family Law & Tax Handbook, Dale was Educated at McGill University Law School and holds degrees in both civil and common law. He speaks English, French and Spanish, and following Law school, Dale worked as an articling student at Torys LLP, and shortly after was called to the bar, in 2009 started Barrett Tax Law – a national tax law boutique.

Together with his associates, paralegals, law clerks, and legal assistants, he provides representation and tax advice with respect to matters involving both the Canada Revenue Agency and various provincial taxation authorities. Having represented and provided advice to clients with matters before the Tax Court of Canada, the Federal Court, the Federal Court of Appeal, the Alberta Court of Queen's Bench, the Ontario Superior Court, and the British Columbia Provincial Court, Dale has developed a broad tax expertise across various courts in various provinces.

Together with his dedicated and hardworking team, Dale works to make the Canadian taxation system a little fairer for the taxpayer who has to compete against the resources of the government. The CRA has enormous capabilities and Dale ensures a level playing field where his clients' rights are protected.

While Dale has a broad tax practice, he focuses on: providing tax advice, voluntary disclosures (aka "tax amnesty), tax litigation, Canada Revenue Agency Disputes, Audits, GST/HST Audits, net worth assessments, unfair assessments / reassessments, late filing, criminal charges related to the Income Tax Act, failure to file charges, failure to comply charges, section 160 assessments, Director's liability assessments, Section 85 rollovers, First Nations tax issues, tax liens, wage garnishees, frozen bank accounts, and Requirements to Pay.

Dale also has a broad corporate commercial practice and is involved with his corporate clients in all their life stages – from incorporating companies to working on amalgamations and reorganization to providing representation for the ultimate sale / exit.

Introducing Dominic Colussi CFP, CLU

Domenic is a motivator and strives to become better each and every single day. He's a proud father of 4. He looks forward to being your value-added business planning partner! Domenic's been working in the financial services industry for the last 15 years, providing ongoing support to help Advisors and their clients achieve their lifetime financial goals.

He's a member of Advocis, the Financial Advisor Association of Canada. To better serve his community Domenic has attained his Chartered Life Underwriter CLU, (Canada's Premier designation on Wealth Transfer and Estate Planning) and his Certified Financial Planner CFP, (An Internationally recognized designation for excellence in Financial Planning) This confirms Domenic's commitment to our industry in providing the highest level of support through encouragement, honesty, integrity, and motivation.

Always working to align stars amongst advisors and take charge in active financial planning support for the best interest of our client communities.

His vision is clear in wanting what's best for advisors and clients by making sure their plans count!



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When seniors and their families discover that a retirement residence can make their life better, one of the first questions they ask is, can I afford it? This can often only be answered by a financial professional who is knowledgeable about retirement living and the associated costs.

Learn how a partnership with Chartwell can bring you new clients and provide value to your existing ones.

Email us today at partnership@chartwell.com to schedule an information session with your team.



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Breakout #12

5:15 PM - 6:00 PM FLORENTINE C/D (MAIN MEETING ROOM)

Please note special time for this one!

Best Practices for the New Financial Life Planning Conversation

Presented by Richard Dolan

Sponsored by Financial Life Professionals

What will the advisor learn from this presentation?

The advisor will leave this session with the education and tools they need to position themselves as a trusted Leader, Coach and Financial Advisor to their clients and prospects.

They will learn how to retain more clients, how to differentiate themselves in a competitive market, how to optimally monetize their existing relationships and increase their results by using the products and solutions that they are licensed to sell.

Presentation Overview

Financial planning is the key to financial independence that ensures greater security for the future. It has both immediate and long-term benefits and therefore, it is important to keep altering it as one crosses different life stages. This can be achieved by calculating the liabilities and assets and deploying investment strategies, enabling people to be more careful of their spending to aid financial stability.

A well-crafted financial plan also promotes efficient tax management and incorporates provisions for insurance and well-being. This approach can ensure that all the major expenses are well-managed, and you do not have to depend on others, financially.

Richard will share the actual tools used in the NEW conversation about financial life planning that will include:

- The conversational playbook
- The personal assessment process for your clients (KYC & Financial Planning)
- The Financial Life Vault and
- Your NEW action plan

Please refer to Richard's bio from his main stage presentation.



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After the presentation, mingle at the Meet n Greet from 6 - 7 PM and then enjoy the Vegas nightlife.

You are welcome to get a selfie with Richard and his 2020 Miami Heat NBA Championship ring after the breakout is finished. One of 2 he received from Coach Juwan Howard for his role as an advisor to the team.



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MAIN STAGE AGENDA FOR WEDNESDAY, SEPTEMBER 20, 2023

7:45 AM Sharp

**Program starts with your MC - Mike Englert BA, B.Ed., EPC –
Founding CIEPS Faculty Member, CIEPS Compliance Officer**

8:00 AM - 9:00 AM

Tax And Estate Planning Leveraging The Use Of Life Insurance As An Asset Class
**Presented by Peter Wouters RFG, AIAA, ARP, TEP, FLMI, RHU, CFP, CLU, CHFC,
ACS, ALHC, CPCA, CHS, AFSI, EPC**

Sponsored by Canadian Initiative for Elder Planning Studies

What will the advisor learn from this presentation?

In this presentation, Peter will address the importance of having life insurance when it is needed most. He will address the flexibility and many tax advantages when insurance is used as a retirement, financial or estate planning tool.

Presentation Overview

A number of Investors rely on fixed income investments like bonds to provide income and capital preservation benefits to their portfolios. With a 40-year downward trend in interest rates, where has this left these investors?

Learn about a multi-purpose alternative that leverages its flexibility, adaptability, versatility and tax preferred status to address multiple concerns and values held by individual investors, their families and the businesses they may own.

Introducing Peter Wouters, RFG, AIAA, ARP, TEP, FLMI, RHU, CFP, CLU, CHFC, ACS, ALHC, CPCA, CHS, AFSI, EPC - CIEPS Advisory Council & Faculty Chair

Peter is a well-respected, much sought after speaker and subject matter expert in tax, retirement, and estate planning.

Peter devotes much of his time working with independent advisors and other professionals uncovering issues and concerns faced by affluent individuals, professionals, and business owners. He supports their efforts in researching and developing optimal solutions for clients aimed at improving their financial well-being and supporting their personal wishes and lifestyles. He has provided 1000s of workshops, seminars, and technical support internationally on tax, retirement and estate planning issues, concepts, and strategies. Peter, an accredited Registered Financial Gerontologist, educates people of all professions who work with or specialize in the needs, expectations, and issues of an aging population. Comprehensive lifestyle planning is an important element of these processes.

He has been repeatedly interviewed on regional and national television, radio, newspapers, and journals as an expert on various industry issues and developments. He is a prolific writer on matters dealing with retirement, financial and lifestyle planning, for which he has received several international awards.

Among his many professional and industry affiliations are: CALU (Conference of Advanced Life Underwriting), the Society of Trust & Estate Practitioners, the Institute of Research & Planning, the Canadian Tax Foundation, the American Institute of Financial Gerontology, and the American Society on Aging. He is faculty chair of the International Elder Planning Counsellor program.

A graduate of McMaster University, Northeastern University and Widener University, Peter has over four decades of experience. He is a true student of business as attested to by his many professional designations.

9:00 AM - 10:00 AM

Proactive Planning for Changing Care Needs: A Practical Approach for Senior Clients

Presented by Amanda Richards BA CPCA, EPC

Sponsored by Chartwell Retirement Residences

What will the advisor learn from this presentation?

You have looked after your client's retirement needs, or so you thought. What happens if they end up in a nursing or long term care home? Will they have all the funds that they will require? Did you set them up with a Long-Term Care policy, or access to funds so that they can look after this next stage of their lives comfortably.

This informative session will enable you to elevate your service offerings by engaging your clients in conversations around their changing care needs and understanding the financial, health, and social implications of various scenarios.

Presentation Overview

Throughout our working lives, we plan for our dream retirement. We plan for a lifestyle of leisure and travel, and finally pursuing our passions and interests. We also plan for end-of-life with wills, estate plans, and funerals.

But what about that gap of time in between active retirement and end-of-life? How do you help your clients prepare for the eventuality of personal care services? Whether your client desires to live at home with support, downsize, or move to congregate living at some point, there are numerous elements to consider and plan for.

Introducing Amanda Richards BA CPCA, EPC Director of Business Development and Community Integration

Amanda Richards is the Director of Business Development and Community Integration at Chartwell Retirement Residences, Canada's largest senior living provider. She is a dedicated relationship builder within the sector, with extensive experience in sales leadership, coaching and business development.

She has a rich history in the Canadian senior living landscape with over 15 years of experience and is currently responsible for Chartwell's B2B strategy inclusive of National Partnerships. She holds an undergraduate degree from McMaster University, a post-graduate diploma in leadership from Athabasca University and her CPCA (Certified Professional Consultant on Aging) designation.

She is well-versed in the intricacies of helping seniors and their families navigate the complexities of today's senior-living options and understand the challenges associated with selling to and working with this market segment.

10:00 AM - 11:00 AM

Following the Smart Money Managers – A Value Add Partnership Proposal

Presented by Klint Rodgers & Brian Fraser CIM

Sponsored by Access Capital Advisors & Centurion Asset Management

What will the advisor learn from this presentation?

Choosing investments for one's portfolio can feel like an intimidating task given the multitude of options available in today's financial landscape.

In this presentation Klint Rodgers, National Team Lead and Registered Dealing Rep for Access Capital Advisors and Brian Fraser CIM, Director of Sales for Centurion Asset Management will show how the client can decrease volatility, hedge against inflation and increase one's overall rate of return.

They will discuss the importance of having insurance to protect any financial or retirement planning recommendation that the client or prospect implements.

Presentation Overview

Klint and Brian will show the advisor how to provide investment knowledge and strategies, during the various planning processes so that their clients and prospects fully understand financial markets and applicable risk factors.

They will offer solutions on how you can truly diversify a portion of their portfolio and position a different investment with your clients and prospects as part of the financial, retirement and estate planning process.

Klint and Brian will address how private and public offerings, as well as insurance can compliment one another and essentially form the 3 legs of the investment stool.

In addition, they will discuss:

- An introduction to Access Capital Advisors
- Compliance and how corporate due diligence is completed to protect the investor.
- Private Markets and rebirth in 2009 with NI 31-103
- A look at the Smart Money Managers, such as Harvard, Yale, CPP and OMERS and the importance of why you should follow what they do
- Private vs Public REIT Index performance review
- An intro to some of the many Private Real Estate & Alternative Investment Firms we represent
- An introduction to Centurion Asset Management and the Centurion REIT which has become Canada's largest dedicated Private REIT with over 21,000 units, valued at over \$6.5B
- Why Centurion has never missed a monthly distribution, never had a negative year and never refused a redemption request while maintaining RRSP/TFSA eligibility and averaging 13.23% compounded annually since it's 2009 inception

Klint will wrap things up by encouraging financial advisors to reach out to him to learn more about this value added referral partnership opportunity. He will discuss how the advisor can make money from referrals and continue to build a fence around the client.

Introducing Klint Rodgers Registered Access Dealing Representative for BC, AB, SK & ON

Klint was born and raised in Vancouver, BC. A serial entrepreneur, he has owned and operated half a dozen or so businesses right out of college. At a young age, Klint quickly realized real estate was where his passions were and eventually went on to supplement his self-employed income through the purchase and sale of many personal properties on Vancouver's lower mainland. In 1998, while at college for the 2nd time, Klint met his future wife and ended up getting married in Seoul, South Korea in April of 2000. Today, Klint is the proud father of a 16-year-old daughter and has been married for 23 years.

With his family's future in his hands, he went on to become a Registered Dealing Representative in the Exempt Market in 2011 and has not looked back. Klint has become one of the Top Producers in the Country representing 12-15 plus Private Equity & Private Real Estate Investment Firms at any given time, presently holding licenses in BC, AB, SK & ON with the securities commission and proudly partnered with the Exempt Market Dealership, Access Capital Advisors. Klint is also the National Team Lead and a Branch Administrator at Access Capital, as well as the CEO and Co- Founder of Canvest Financial.

Klint has been recognized three times now by Wealth Professionals Magazine as a Finalist for Best Advisor in the Alternative Investments sector.

Klint likes to take a European multi-family office approach with his business, by standing side by side with his clients, to help them build a team of professionals whether they be in the Private, Public, Insurance, Accounting or Legal profession. It is this client's first approach that has allowed Klint to build a successful investment practice and become very well-known across the country by his peers in the private (exempt) markets and beyond. Klint also sits or has sat on several Advisory Boards, including with the BC Chapter for the Private Capital Markets Association (PCMA), Big Brothers of Greater Vancouver Charitable Gift Advisory Team and presently is an Advisor to the Board of Directors for the StoreWest Group of Companies and Cascadia Green REIT.

Klint also happens to be Dual Licensed as an Independent Insurance Advisor as well, thus helping his clients focus on numerous tax, estate and retirement planning strategies and solutions to better protect, preserve and grow one's wealth.

You will often hear Klint say, "KYP, KYP, KYP" which stands for Know Your Product and in following with this practice Klint continues to educate himself when not hanging out with his family. He passed the EMP (Exempt Market Products) Course in 2011, the Fundamentals of Alternative Investments Certificate Program, as well as the Charitable Giving Advisors Courses in 2015 and the Life Licensed Qualification Program (LLQP) in 2021. These accomplishments help him to better serve his associates, friends, family and clients.

Introducing Brian Fraser, CIM Director - Investment Sales

Brian Fraser is the Director of Investment Sales at Centurion Asset Management. Throughout Brian's 20+ years of progressive experience in the investment and financial services industry, Brian's strong entrepreneurial skills, adaptability and sales aptitude has resulted in a successful track record in the investment management industry.

Prior to joining the Centurion team, he served in several senior roles within the investment management industry, including District Sales Manager, Institutional Sales at Fidelity Investments Canada Ltd., one of the largest mutual fund companies in the world. Brian later became a Regional Director at National Bank Investments and most recently, he was a VP National Sales of at a Toronto based private equity firm where he was instrumental in product development, raising capital and managing a sales team across the country.

Brian is a graduate of the University of Toronto with a B.A. degree in Political Science. Brian is a Chartered Investment Manager (CIM) and has successfully completed the Professional Financial Planning Program (PFP).

11:00 AM - 12 PM

Using IA Par Product In An Insured Retirement Strategy

Presented by Patrick Kocmiel, Director of Sales

Sponsored by iA Financial Group

What will the advisor learn from this presentation?

In this session, the advisor will learn that the insured retirement strategy with permanent life insurance allows their clients to diversify their non-registered assets in a tax-efficient manner while benefiting from the necessary liquidity to generate a flexible retirement income.

They will also learn that this strategy can be a very interesting option for their clients with a 10- to 15-year horizon before retirement to protect themselves against market volatility.

Presentation Overview

In this presentation, Patrick will discuss the following points:

- How to position this concept with high-net-worth individuals or business owners
- How the Estate version will benefit the advisor
- iA PAR Wealth version as an option
- How to position the right version to the client
- How to position the amount of non-taxable loan required for additional retirement income needs
- Financial requirements to meet the financial institution
- The tax-free benefit to the estate
- Longevity risk in the event where the loan/surrender value ratio exceeds the long-term forecasts

Introducing Patrick Kocmiel, Director of Sales iA Financial Group

Patrick has been in the Insurance industry for 24 years. Upon graduating from Humber College in the area of Business Marketing & Management in 1996, he started in the personal lines area with The Co-operators before later moving to AIG to take on a role in Financial Claims.

In 2004, Patrick returned to The Co-operators with the opportunity to manage his own agency selling personal lines, commercial and financial products for the next 11 years.

In early 2016, he joined IA as a Marketing Associate, before accepting the position of Director of Sales in 2020, where he has been busy focusing on building strong relationships with agencies and their advisors.

Whenever possible he likes to get outdoors, playing golf, camping, and spending time with his wife, Rondi, their three children and two dogs.

12:00 PM - 1:00 PM

Positioning Your Practice For The 51%: What Women Really Want From Their Financial Professional

Presented by Lisa Elle FCSI, CFP, CCS, RIS, CHS, CPCA, EPC

Sponsored by Ellements Financial Group

What will the advisor learn from this presentation?

Financial services firms want to reach more women, but many advisors really do not know how to market effectively to female clients!

In this presentation, Lisa will cover the information and ideas that you will need so that you can begin to market in this very lucrative demographic if you are not already doing so.

This presentation should be considered to be the “ice breaker” that you need to know when working with the female market. If you don’t do it, someone will!

Presentation Overview

Baby Boomer women in particular feel disconnected from marketing messages. Many financial brands are missing opportunities to connect with Baby Boomer women at a time in their lives when they not only have interest but also the resources to engage in these categories.

Women say that financial institutions that do manage to market their products and services effectively to the female demographic still have a lot of room for improvement. They tend to see the relevancy to women, just not to themselves.

Lisa will cover the following:

- Statistics: Painting the Canadian landscape for Women who maintain full control over resources at different points in their life. She will look at other statistics of pertaining to women financial positions, income equality, financial knowledge awareness, etc. and the changing landscape in Canada
- Pre-Planning: Planning today for the unexpected loss of a partner while in a partnership (cash flow planning, risk management, emergency planning, investment planning and estate planning considerations)
- Immediate Considerations when faced with loss of various kinds
- Where things go wrong? Lisa will share some real-life client stories and words of caution
- Single Income cash flow planning, risk management, emergency planning, investment & retirement planning and estate planning considerations
- Practical estate and legacy implications & considerations

Introducing Lisa Elle FCSI, CFP, CCS, RIS, CHS, CPCA, EPC Founder of the Ellements Financial Group

Lisa Elle is the founder of Ellements Financial Group, host of the Money Makeover Podcast & the author of STRUT: How to Kick Financial ASSETS. Lisa has been a wealth strategist and a Certified Financial Planner® for over 22 years and is passionate about helping people create financial clarity and fund their dreams.

Lisa's professional training for this career began by graduating with a Diploma in Business Administration from Mount Royal University in 2000. She then went on to study insurance and mutual funds in 2001.

She received her Certified Financial Planner (CFP) designation in 2006, and her Certified Professional Consultant on Aging (CPCA) in 2009. Lisa also completed her Bachelor of Management through Athabasca University in 2012. In 2015, Lisa completed her Fellowship with the Canadian Securities Institute (FCSI), the most senior credential and highest honor in Canadian financial services. Lisa Elle is a Certified Cash Flow Specialist (CCS), Elder Planning Counselor (EPC), Certified Health Insurance Specialist (CHS), Responsible Investment Specialist (RIS) and loves helping women with cash flow planning so that they can accomplish their long-term goals while still buying Starbucks, Shoes and Handbags guilt free!

Lisa Elle has been featured numerous times as a financial expert on Global TV, CTV, the Toronto Star, Huffington Post, Morningstar, Microsoft, and recently the feature story for Investment Executive Journal across Canada.

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2023 22nd National Advisors Conference Continuing Education Credits Available for the Main Platform Presentations and the Breakout Sessions

All CE instructions will be emailed to you with your CE certificate and receipt after the conference is completed.

Due to recent changes in the various regulatory bodies CE mandates, and in order to be eligible for the CE credits available for this conference, you **MUST** get scanned in and out of each session. **NO EXCEPTIONS**

Please see below for Approval numbers. Rest assured that you WILL BE receiving 30 CE credits through a combination of attending all the main stage presentations and with us giving you access to our APPROVED ONLINE CE CATALOGUE to complete up to 30 CE credits. And, you will have a year to complete them. You can earn additional CE credits by attending the Breakout Presentations.

Please note:

If you reside in BC, SK, MB & ON, most of the advisors have 1 License for both Life & A&S. This means that a Life CE credit is an A&S CE credit.

If you reside in AB, you have 2 license certificates. One for Life and the other for A&S. This means that each license is a stand-alone license and has a separate CE credit requirement. Currently AB advisors require 15 CE credits for each license.

CE CREDITS FOR THE MAIN PLATFORM PRESENTATIONS

Your attendance for **ALL** the Main Platform presentations will earn you the following CE credits:

30 CE Credits are available for the financial services profession. You will get CE credits for your attendance, and you will then have 1 Year to do **ADDITIONAL ONLINE CE** at no additional cost to you by using our APPROVED **ONLINE CE CREDIT CATALOG**.

HERE IS HOW YOU WILL GET YOUR CE CREDITS:

For BC, SK & ON Licensed Advisors

Attending all the main platform presentations on Sept. 18, 19, 20, 2023 will give you a total of 15 CE credits. You will then have 1 YEAR to complete another 15 Online CE credits for a total of 30 CE credits.

For AB resident Advisors - AAC # 65523

Attending all the main platform presentations on Sept. 18, 19, 20, 2023 will give you a total of 10 Life & 4 A&S CE credits. You will then have 1 YEAR to complete another 20 Online CE credits for a total of 30 CE credits.

For MB resident Advisors - ICM # 42192

Attending all the main platform presentations on Sept. 18, 19, 20, 2023 will give you a total of 15 CE credits. You will then have 1 YEAR to complete another 15 Online CE credits for a total of 30 CE credits.

QC resident Advisors

Unfortunately you will not receive any PDU CE credits for attending all the main platform presentations on Sept. 18, 19, 20, 2023, but you will have access to complete up to 30 PDU CE credits at no additional cost to you by using our QC Approved Online CE Credit Catalog. You will have 1 YEAR to complete these online PDU CE credits.

For Advisors from the Atlantic Provinces - You do not require CE credits to maintain your insurance licenses, but YOU DO require CE credits for any financial designations that you hold.

Attending all the main platform presentations on Sept. 18, 19, 20, 2023 will give you a total of 15 CE credits. You will then have **1 YEAR** to complete another 15 Online CE credits for a total of **30 CE credits**.

Any CE credits earned from this conference could be used towards those designations. Please check the various designations for more information.

FP Canada - CFP/QAFP Designation “Verifiable” CE credits - Any CE credits earned from the NATIONAL ADVISORS CONFERENCE could be used for the following CE categories of CE credits - Financial Planning, Practice Management, Professional Responsibility, Product Knowledge or Giving Back as per the definition of each. FP Canada leaves it up to the CFP designee to determine what category these CE credits will fall into.

Advocis - Any CE credits earned from the NATIONAL ADVISORS CONFERENCE are considered “Approved” CE credits for Advocis. Send your certificate to them so that these CE credits are included for your Advocis CE requirements.

IIROC (Investment Industry Regulatory Organization of Canada) - Course ID - 23-0568P You will receive 14 Professional Development CE credits for attending all main stage presentations on Sept. 18, 19 & 20, 2023.

These Professional Development credits can be used for Cycle 9 beginning January 1, 2022, and ending December 31, 2023.

Mutual Funds Dealer Association (MFDA) - Course ID - 100004096

PLEASE NOTE - NEW CE REQUIREMENTS FOR MFDA - Under the continuing education (CE) program, MFDA advisors must earn 30 CE credits within each two-year cycle. These credits comprise 8 business conduct credits (including ethics), 20 professional development credits and 2 MFDA-created compliance credits.

You will receive 14 Professional Development CE credits for attending all main stage presentations on Sept. 18, 19 & 20, 2023.

These Professional Development credits can be used for Cycle 1 beginning December 1, 2021 and ending November 30, 2023.



Be Ready for Higher Standards!

The Elder Planning Counselor Designation (EPC) program has been designed to give you the credibility and knowledge necessary to interact with our aging society.

Why not become a student of Elder issues?

Due to the overwhelming response, we are holding off increasing the tuition Fees for a little while longer, but don't delay.

As a thank you for attending this conference, we are offering you a "SPECIAL TUITION" of ONLY \$795 + taxes, for the Live Toronto Fall Exam Preparation Class or the Distance Learning method of attaining your EPC Designation TODAY!

You have choices on how you can earn your EPC Designation & still save on the cost of tuition for a limited time.

Register today for the Distance Learning option or choose the Toronto, ON Live in-person or Live Webinar Option - Nov. 20, 21, 22, 23, 2023 to secure the \$795 special tuition pricing before the tuition increases.

In the question box on the enrollment form, enter VEGAS 2023 and you will only be charged the special tuition.

Don't be disappointed! Baby Boomers need an "Elder Planning Counselor" qualified advisor. Regardless of your discipline or where you operate, knowing more about the right way to handle elder clients and their issues will only make you better at what you do.

You have probably thought about it, and NOW is the time to add the EPC Designation to your credentials AND save on the tuition.

View all the information here - **www.cieps.com** and ENROLL NOW to begin your EPC journey. Your materials will be sent to you immediately upon registration.

View all the Provincial Regulatory, IIROC, MFDA and other Association CE credits below.

Still not sure? Read what Peter Wouters, our EPC Faculty Chair has to say...

A quote from Mr. Peter Wouters, RFG, AIAA, ARP, TEP, FLMI, RHU, CFP, CLU, CHFC, ACS, ALHC, CPCA, CHS, AFSI, EPC - CIEPS Advisory Council & Faculty Chair, "Anyone interested in developing a specialty and acumen in the unique needs, wants and issues of today's and tomorrow's elder population will find this a very worthwhile program. We are confident that much of what you will learn you will not

have picked up elsewhere, certainly not in a format geared to actionable items and developing deep meaningful relationships with elders, beyond the numbers and figuring out how much is enough.”

Regardless of your discipline or where you operate, knowing more about the right way to manage elder clients and their issues will only make you better at what you do.

With new Regulations, proper advice and proving value for money is critical to success. An Elder Planning Counselor Designation puts you ahead of the curve.

Check out all the EPC details at www.cieps.com and ENROLL NOW for the **Distance Learning Option**. Select the 3rd Option under Full Payment
Please note – This method of learning requires full payment up front.

View ALL the Distance Learning Information here -
EPC Distance Learning Information.

Upon registration, you will receive the 4 volume EPC Desk Reference materials, EPC Student Workbook, All the EPC Chapter PowerPoints (as used in a live class), EPC Registration booklet that contains helpful tips as well as an EPC Qualification practice exam.

All the Provincial, Regulatory Body & Association CE Credits can be found at www.cieps.com under Verified CE Credits.

Special Note to our BC students...Earn your EPC Designation and get 2 years of CE credits fulfilled. This means that if you enrol and complete the EPC program after May 31, 2023, you will have enough CE credits for 2024 and 2025 completed.

Did you know that the EPC Designation program is APPROVED for the MFDA – ID # 100000182

Successful completion of the EPC Designation Program qualifies for 20 Professional Development CE credits, 2 Business Conduct Ethics & 3 Business Conduct Non-Ethics CE credits, for Cycle 1 beginning December 1, 2021 and ending November 30, 2023.

Please note – NO PDUs are available for QC resident advisors for completing the EPC Designation program, but we will give you access to complete up to 30 PDUs of our QC APPROVED Online Self-Study through our sister company Pro-Seminars. **View QC Approved PDUs Here**

Advocis - The EPC Designation program is “Approved / Accredited” for Advocis and the Institute for Advanced Financial Education (IAFE), upon successful completion for 30 CE Credits for CLU, CHS etc.

IIROC CE APPROVALS - Successful completion of the EPC Designation Program qualifies for 20 Professional Development CE credits, IIROC ID # 22/0152P & 5 Compliance CE credits IIROC ID # 22-0152C for Cycle 9 beginning January 1, 2022 and ending December 31, 2023.

FP Canada - CFP Designation “Verifiable” CE credits - Any CE credits earned from CIEPS could be used for a specific amount of the following CE categories of CE credits - Financial Planning, Practice Management, Professional Responsibility, Product Knowledge or Giving Back as per the definition of each. FP Canada leaves it up to the CFP designee to determine what category these CE credits will fall into.

Got to www.cieps.com and **ENROLL NOW** to become a student of Elder Issues and begin your EPC journey.

Contact Alex Nicholson – alex@cieps.com with any questions that you have

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Some of our current & past EPC partners...



For all the EPC program information, CE credits or to start the program, visit us at elderplanningcounselor.com or cieps.com

Or contact Alex Nicholson at 855-882-3427 or by email - alex@cieps.com



Elder Planning Counselor

A professional designation developed by Canadians for Canadian Professionals

“An Elder Planning Counselor (EPC) is a student of elder aging issues as they apply to professional and business practice. The EPC is a companion designation that enhances the value of other professional qualifications by helping apply them to consumers more effectively.

An EPC is your assurance that your advisor wants to do their job better by knowing your life better.”

Jim Ruta BA, RHU, EPC, CIEPS Advisory Council & Faculty Member.



We invite you to explore our web site to learn more about our program. We are sure that you will find the Elder Planning Counselor “EPC” Designation Program, informative, rewarding and most of all, useful to you as you interact with our aging population.

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Over 130 years of growth and security



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