Pro-Seminars

SSC # 155 – THE "PLAN B" COURSE: CONTINGENCY PLANNING FOR EVERY STAGE OF LIFE

This course is eligible for:

2.5 Life & A&S CE Credits for BC, SK, MB & ON.

2.5 Life ONLY CE Credits for AB.

Target Audience

- Life & health insurance advisors
- Financial planners (CFP, PFP, QAFP)
- Retirement specialists
- Estate planners
- Wealth advisors
- Group benefits advisors
- Small business advisors
- Bank-based advisors
- Credit union advisors
- Independent brokers

Course Purpose

The purpose of this course is to:

1. **Equip advisors** with a comprehensive framework for contingency planning
2. **Strengthen client resilience** against financial, health, and family shocks
3. **Integrate risk management** into every stage of the financial planning lifecycle
4. **Improve advisor compliance** through documentation and due diligence
5. **Provide practical tools** for building backup plans clients can rely on
6. **Reduce client vulnerability** to income loss, incapacity, and estate complications
7. **Enhance advisor professionalism** by elevating planning depth
8. **Support advisors** in delivering holistic, regulator-aligned advice

This is not a product course. This is a **professional risk-management and contingency-planning course**.

LEARNING OBJECTIVES

By the end of this course, advisors will be able to:

1. Build contingency plans for income disruption
2. Build contingency plans for caregiving and health shocks
3. Build contingency plans for incapacity
4. Build contingency plans for estate execution
5. Build contingency plans for retirement shocks
6. Integrate insurance solutions appropriately
7. Apply compliance and due diligence standards
8. Use case studies to apply concepts