2026Virtual Spring Summit

MARCH 4, 2026 11 AM - 5PM EST

IFB CISF

EVENT SCHEDULE

(All times are in EST)

11:00 AM	**Advising Clients in the Age of AI: A Behavioural Finance Perspective** Sasha Tregebov, BIT Canada	1 Life - ON, SK 1 Life/A&S - BC, MB 1 FP Canada 1 MFDA 1 AIC - Life
12:00 PM	**Break**	
12:15 PM	**Tips, Traps & Considerations for Beneficiaries** Jos Herman, Resources & Solutions Professional Corp.	1 Life - ON, SK 1 Life/A&S - BC, MB 1 FP Canada 1 MFDA 1 AIC - Life, A&S
1:15 PM	**Break**	
1:30 PM	**Horror Stories: Planning from the Legal Perspective** Meagan Jennings, BLG	1 Life - ON, SK 1 Life/A&S - BC, MB 1 FP Canada 1 MFDA 1 AIC - Life
2:30 PM	**Break**	
2:45 PM	**AI, Advisors, & the Regulatory Blind Spot: A Compliance-First Approach** Dave Faulkner, VibePlan	1 Life - ON, SK 1 Life/A&S - BC, MB 1 FP Canada 1 MFDA 1 AIC - Life
3:45 PM	**Break**	
4:00 PM	**State of the Markets: Key Trends and Insights** Michael Greenberg, Franklin Templeton Investment Solutions	1 Life - ON, SK 1 Life/A&S - BC, MB 1 FP Canada 1 MFDA 1 AIC - Life

Continuing Education Glossary

FP Canada Approved CE:

FP - Financial Planning, PM - Practice Management, PK - Product Knowledge, PR - Professional Responsibility

AIC - Alberta Insurance Council