



# 2023 BC Spring Summit

May 9, 2023, 8:00 a.m. - 5:00 p.m.  
River Rock Casino Resort, Richmond BC

8 - 9 a.m.	Registration
9:00 a.m.	<div><b>Unlocking Growth Opportunities: Financing Strategies for Financial Advisory M&amp;A</b></div> <div><i>Tom de Larzac &amp; Pierre Sauvé, CWB Maxium Financial</i></div> <div>1.00 Life and/or A&amp;S (#41110)   1.00 FP Canada: Practice Mgmt. (12971)   1.00 MFDA PD (1000003432)</div> <div>1 </div>
10:00 a.m.	Coffee Break
10:15 a.m.	<div><b>Travel Insurance + Uncertain Times = Opportunity!</b></div> <div><i>David Roberts, Group Medical Services</i></div> <div>1.00 Life and/or A&amp;S (#41111)   1.00 FP Canada: Product (12973)   1.00 MFDA PD (1000003433)</div> <div>1 </div>
11:15 a.m.	Break
11:30 a.m.	<div><b>Cascading Life Insurance - Tax efficient intergenerational wealth transfer</b></div> <div><i>Mitchell Jay Singer, RBC Insurance</i></div> <div>1.00 Life and/or A&amp;S (#41109)   1.00 FP Canada: Financial Planning. (12970)   1.00 MFDA PD (1000003431)</div> <div>1 </div>
12:30 p.m.	Lunch
1:30 p.m.	<div><b>Let's get Uncomfortable: Life Changes and Difficult Conversations with Clients</b></div> <div><i>Amanda Richards, Chartwell Retirement Residences</i></div> <div>1.00 Life and/or A&amp;S (#41107)   1.00 FP Canada: Financial Planning. (12969)   1.00 MFDA PD (1000003430)</div> <div>1 </div>
2:30 p.m.	Break
2:45 p.m.	<div><b>Bridging the Gap: Exploring Solutions for Improved Healthcare Access in Canada</b></div> <div><i>Deepinder Bajwa, Best Doctors Insurance</i></div> <div>1.00 Life and/or A&amp;S (#41108)   1.00 FP Canada: Product (12968)   1.00 MFDA PD (1000003426)</div> <div>1 </div>
3:45 p.m.	Break
4:00 p.m.	<div><b>Secure Your Clients Savings with GICs: A Comprehensive Guide to Fixed Income Investments</b></div> <div><i>Christina Maurice Fazio, HomeTrust</i></div> <div>1.00 Life and/or A&amp;S (#41112)   1.00 FP Canada: Product (12974)   1.00 MFDA PD (1000003434)</div> <div>1 </div>