



2023 Toronto Spring Summit

Pearson Convention Centre

Day 1: May 24, 2023, 8:00 a.m. - 5:00 p.m.

8 - 9 a.m.	Registration and Coffee
9:00 a.m.	Bridging the Gap: Exploring Solutions for Improved Healthcare Access In Canada 1 Approved CE FP Canada <i>Deepinder Bajwa, Best Doctors Insurance</i> 1.00 Life 1.00 FP Canada: Product Knowledge (12968) 1.00 MFDA PD (1000003426)
10:00 a.m.	Coffee Break
10:15 a.m.	Cascading Life Insurance: Tax efficient intergenerational wealth transfer 1 Approved CE FP Canada <i>Mitchell Jay Singer, RBC Insurance</i> 1.00 Life 1.00 FP Canada: Financial Planning (12970) 1.00 MFDA PD (1000003431)
11:15 a.m.	Break
11:30 a.m.	Let's get Uncomfortable: Life Changes and Difficult Conversations with Clients 1 Approved CE FP Canada <i>Amanda Richards, Chartwell Retirement Residences</i> 1.00 Life 1.00 FP Canada: Financial Planning (12969) 1.00 RIBO PD 1.00 MFDA PD (1000003430)
12:30 p.m.	Lunch
1:30 p.m.	The Future-Ready Advisor 1 Approved CE FP Canada <i>Sheldon Stier, Independent Financial Brokers of Canada</i> 1.00 Life 1.00 FP Canada: Practice Mgmt. (13165) 1.00 MFDA BC (1000003565)
2:30 p.m.	Coffee Break
2:45 p.m.	Financial Professionals Title Protection Framework 1 Approved CE FP Canada <i>Wendy Horrobin, Financial Services Regulatory Authority</i> 1.00 Life 1.00 FP Canada: Practice Mgmt. (13224) 1.00 MFDA BC (1000003705)
3:45 p.m.	Break
4:00 p.m.	Protecting Yourself and Your Clients: E&O Insurance Essentials for Financial Professionals 1 Approved CE FP Canada <i>Roberta Tasson, The Magnes Group</i> 1.00 Life 1.00 FP Canada: Practice Mgmt. (13166) 1.00 RIBO Technical 1.00 MFDA BC (1000003565)



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Day 2: May 25, 2023, 8:30 a.m. - 1:30 p.m.

8 :30 a.m

Coffee and Breakfast

9:00 a.m.

Behavioural Insights and Financial Behaviour

1 Approved CE
FP Canada

Sasha Tregebov, Behavioural Insights Team

1.00 Life | 1.00 FP Canada: Financial Planning (13169) | 1.00 MFDA PD (1000003566)

10:00 a.m.

Break

10:15 a.m.

Understanding your Risk: “Cyber” and Privacy-Related Claims

1 Approved CE
FP Canada

Margaret Mede & Imran Ahmad, Axis Reinsurance Co.

1.00 Life | 1.00 FP Canada: Practice Mgmt. (13152) | 1.00 RIBO Technical | 1.00 MFDA BC (1000003562)

11:15 p.m.

Break

11:30 p.m.

The Elder Enigma

1 Approved CE
FP Canada

Mike Englert, Canadian Initiative for Elder Planning Studies

1.00 Life | 1.00 FP Canada: Financial Planning (13172) | 1.00 MFDA BC (1000003567)

12:30 p.m.

A Good Plan Today is Better Than A Perfect Plan Tomorrow

1 Approved CE
FP Canada

Roland Chan, FindBob

1.00 Life | 1.00 FP Canada: Practice Mgmt. (13164) | 1.00 MFDA PD (1000003563)