



2023 Virtual Spring Summit

Day 1: June 13, 2023 | 11:00 a.m. - 6:15 p.m. EST

All times are in EST

11:00 a.m.	<p style="text-align: right;"></p> <p style="text-align: center;">Cascading Life Insurance: Tax efficient intergenerational wealth transfer</p> <p style="text-align: center;"><i>Mitchell Jay Singer, RBC Insurance</i></p> <p style="text-align: center;">1.00 Life (ON,SK) 1.00 Life/A&S (BC, MB) 1.00 Life (AB) 1.00 FP Canada: Financial Planning 1.00 MFDA PD</p>
12:00 p.m.	Break
12:15 p.m.	<p style="text-align: right;"></p> <p style="text-align: center;">Secure Your Clients Savings with GICs: A Comprehensive Guide to Fixed Income Investments</p> <p style="text-align: center;"><i>Christina Maurice Fazio, HomeTrust</i></p> <p style="text-align: center;">1.00 Life (ON,SK) 1.00 Life/A&S (BC, MB) 1.00 Life (AB) 1.00 FP Canada: Product 1.00 MFDA PD</p>
1:15 p.m.	Break
1:30 p.m.	<p style="text-align: right;"></p> <p style="text-align: center;">The Future-Ready Advisor</p> <p style="text-align: center;">Sheldon Stier, Independent Financial Brokers of Canada</p> <p style="text-align: center;">1.00 Life (ON,SK) 1.00 Life/A&S (BC, MB) 1.00 Life & A&S (AB) 1.00 FP Canada: Practice Mgmt. 1.00 MFDA BC</p>
2:30 p.m.	Break
2:45 p.m.	<p style="text-align: right;"></p> <p style="text-align: center;">Global Outlook: Moving Fast and Breaking Things</p> <p style="text-align: center;"><i>Drummond Brodeur, Global Asset Management, Sponsored by SSQ</i></p> <p style="text-align: center;">1.00 Life (ON,SK) 1.00 Life/A&S (BC, MB) 1.00 Life (AB) 1.00 FP Canada: Financial Planning 1.00 MFDA PD</p>
3:45 p.m.	Break
4:00 p.m.	<p style="text-align: right;"></p> <p style="text-align: center;">Bridging the Gap: Exploring Solutions for Improved Healthcare Access In Canada</p> <p style="text-align: center;"><i>Deepinder Bajwa, Best Doctors Insurance</i></p> <p style="text-align: center;">1.00 Life (ON,SK) 1.00 Life/A&S (BC, MB) 1.00 A&S (AB) 1.00 FP Canada: Product 1.00 MFDA PD</p>
5:00 p.m.	Break
5:15 p.m.	<p style="text-align: right;"></p> <p style="text-align: center;">Protecting Yourself and Your Clients: E&O Insurance Essentials for Financial Professionals</p> <p style="text-align: center;"><i>Roberta Tasson, The Magnes Group</i></p> <p style="text-align: center;">1.00 Life (ON,SK) 1.00 Life/A&S (BC, MB) 1.00 Life & General (AB) 1.00 FP Canada: Practice Mgmt. 1.00 RIBO Technical 1.00 MFDA BC</p>



2023 Virtual Spring Summit

Day 2: June 14, 2023 | 11:00 a.m. - 3:45 p.m. EST

All times are in EST

11:00 a.m.

A Good Plan Today Is Better Than A Perfect Plan Tomorrow

Roland Chan, FindBob

1.00 Life (ON,SK) | 1.00 Life/A&S (BC, MB) | 1.00 Life & A&S (AB) | 1.00 FP Canada: Practice Mgmt. | 1.00 MFDA PD



12:00 p.m.

Break

12:15 p.m.

Understanding your Risk: "Cyber" and Privacy-Related Claims

Margaret Mede & Imran Ahmad, Axis Reinsurance Co.

1.00 Life (ON,SK) | 1.00 Life/A&S (BC, MB) | 1.00 Life & General (AB) | 1.00 FP Canada: Practice Mgmt. |
1.00 RIBO Technical | 1.00 MFDA BC



1:15 p.m.

Break

1:30 p.m.

Let's get Uncomfortable: Life Changes and Difficult Conversations with Clients

Amanda Richards, Chartwell Retirement Residences

1.00 Life (ON,SK) | 1.00 Life/A&S (BC, MB) | 1.00 Life & A&S (AB) | 1.00 FP Canada: Financial Planning |
1.00 RIBO Personal Skills | 1.00 MFDA PD



2:30 p.m.

Break

2:45 p.m.

Behavioural Insights and Financial Behaviour

Sasha Tregebov, Behavioural Insights Team

1.00 Life (ON,SK) | 1.00 Life/A&S (BC, MB) | 1.00 Life & General (AB) | 1.00 FP Canada: Practice Mgmt. | 1.00 MFDA PD

