



# 2023 Alberta Fall Summit

Best Western Premier Calgary Hotel & Conference Centre

October 3, 2023, 7:30 a.m. - 5:00 p.m.

\*Schedule subject to change

## Plaza Two

7:30 - 8:00 a.m.

### Registration and Coffee

8:00 a.m.

### Harnessing Compliance for Business Success: An Overview for Financial Professionals

*Sheldon Stier, Independent Financial Brokers of Canada*



1.00 Life, A&S, & General (#66062) | 1.00 FP Canada: Practice Mgmt. (#13947) |  
1.00 MFDA Business Conduct (#1000004655)

9:00 a.m.

### Networking Break

9:15 a.m.

### Optimize Succession: Finding Your Successor and Structuring the Deal

*Darrell Jacobsen and Johnathan Ciliberto, Advisor Hunt*



1.00 Life, A&S, & General (#66060) | 1.00 FP Canada: Practice Mgmt. (#13948) |  
1.00 MFDA Professional Development (#1000004656)

10:15 a.m.

### Coffee Break

10:30 a.m.

### Global Medical Care: Your Path to Optimal Private Healthcare Coverage

*Deep Bajwa, Best Doctors Insurance Services Inc.*



1.00 A&S (#66056) | 1.00 FP Canada: Product Knowledge (#13943) |  
1.00 MFDA Professional Development (#1000004650)

11:30 a.m.

### Networking Break

11:45 a.m.

### The Corporate Estate Transfer Strategy

*Mitch Singer, RBC Insurance*



1.00 Life (#66058) | 1.00 FP Canada: Financial Planning (#13945) |  
1.00 MFDA Professional Development (#1000004653)

12:45 p.m.

### Lunch

1:30 p.m.

### Unlocking Opportunities: Strategic Partnerships with Senior Living for Financial Professionals

*Amanda Richards, Chartwell Retirement Residences*



1.00 Life, A&S, & General (#66057) | 1.00 FP Canada: Financial Planning (#13944) |  
1.00 MFDA Business Conduct (#1000004652)

2:30 p.m.

### Networking Break

2:45 p.m.

### Find tax solutions for clients: Insurance & Investment planning

*Jos Herman, Beneva*



1.00 Life (#66059) | 1.00 FP Canada: Financial Planning (#13946) |  
1.00 MFDA Professional Development (#1000004654)

3:45 p.m.

### Coffee Break

4:00 p.m.

### The "Enlightened" Consumer

*Mike Englert, Canadian Initiative for Elder Planning Studies*



1.00 Life & General (#66061) | 1.00 FP Canada: Financial Planning. (#13949) |  
1.00 MFDA Professional Development (#1000004657)