



# 2023 Toronto Fall Summit

Pearson Convention Centre

Day 1: November 7, 2023, 9:00 a.m. - 5:00 p.m.

\*Schedule subject to change

8:00 a.m.	<b>Registration and Coffee</b>
9:00 a.m.	<p><b>Reaching retirement goals amidst macroeconomic headwinds: Fidelity's 2023 Retirement Survey</b> <i>Michelle Munro, Fidelity Investments</i></p>  <p>1.00 Life   1.00 FP Canada: Financial Planning (14047)   1.00 MFDA Professional Development (1000004741)  </p>
10:00 a.m.	<b>Coffee Break</b>
10:15 a.m.	<p><b>Cybersecurity in the Age of AI For the Financial Professional</b> <i>Larry Keating, NPC DataGuard</i></p>  <p>1.00 Life   1.00 FP Canada: Practice Mgmt. (13975)   1.00 MFDA Business Conduct (1000004663)   RIBO Tech. (Pending)</p>
11:15 a.m.	<b>Networking Break</b>
11:30 a.m.	<p><b>The Corporate Estate Transfer Strategy</b> <i>Mitch Singer, RBC Insurance</i></p>  <p>1.00 Life   1.00 FP Canada: Financial Planning (13945)   1.00 MFDA Professional Development (1000004653)</p>
12:30 p.m.	<b>Lunch</b>
1:30 p.m.	<p><b>Global Medical Care: Your Path to Optimal Private Healthcare Coverage</b> <i>Deep Bajwa, Best Doctors Insurance Services Inc.</i></p>  <p>1.00 Life   1.00 FP Canada: Product Knowledge (13943)   1.00 MFDA Professional Development (1000004650)</p>
2:30 p.m.	<b>Coffee Break</b>
2:45 p.m.	<p><b>Buying or Selling a Practice: Do Better!</b> <i>Jeffrey Gregory, Desjardins Financial Security Independent Network</i></p>  <p>1.00 Life   1.00 FP Canada: Practice Mgmt. (13974)   1.00 MFDA Professional Development (1000004662)</p>
3:45 p.m.	<b>Networking Break</b>
4:00 p.m.	<p><b>Driving the Future of Canadian Investment Regulation: CIRO's Journey and Priorities for 2024</b> <i>Andrew J. Kriegler, Canadian Investment Regulatory Organization</i></p> <p>1.00 Life   1.00 FP Canada: Practice Mgmt. (13976)   1.00 MFDA Business Conduct (1000004664)</p>






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Day 2: November 8, 2023, 8:00 a.m. - 1:30 p.m.

\*Schedule subject to change

8:00 a.m.	<b>Breakfast</b>
9:00 a.m.	<b>Unlocking Opportunities: Strategic Partnerships with Senior Living for Financial Professionals</b> <i>Amanda Richards, Chartwell Retirement Residences</i>  1.00 Life   1.00 FP Canada: Financial Planning (13944)   1.00 MFDA Business Conduct (1000004652)
10:00 a.m.	<b>Networking Break</b>
10:15 a.m.	<b>Optimize Succession: Finding Your Successor and Structuring the Deal</b> <i>Darrell Jacobsen and Johnathan Ciliberto, Advisor Hunt</i>  1.00 Life   1.00 FP Canada: Practice Mgmt. (#13948)   1.00 MFDA Professional Development (#1000004656)
11:15 a.m.	<b>Coffee Break</b>
11:30 a.m.	<b>Financial Planning and it's impact on Canadian wellness</b> <i>Alexandra Macqueen, FP Canada</i>  1.00 Life   1.00 FP Canada: Financial Planning (13979)   1.00 MFDA Professional Development (1000004680)
12:30 p.m.	<b>Managing your E&amp;O Risk: Protect Yourself from Claims</b> <i>Natalie Leon, FCL LLP &amp; Margaret Mede, AXIS Capital</i> 1.00 Life   1.00 FP Canada: Practice Mgmt. (13978)   1.00 MFDA Business Conduct (1000004679)   RIBO Technical (Pending)