

EVENT SCHEDULE

Day One: Tuesday, Nov. 19 (All times are in EST)

11:00 AM	The New Factory Thinker 2030 Bill Bishop, <i>The BIG Idea Company</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life) 1 FP Canada – PM 1 MFDA – PD
12:00 PM	Break		
12:15 PM	Best Practices for Successful Practice Succession Darrell Jacobsen & Johnathan Ciliberto, <i>Advisor Hunt</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life, A&S, General) 1 FP Canada – PM 1 MFDA – PD
1:15 PM	Break		
1:30 PM	Navigating the Healthcare Challenges in Canada Deep Bajwa, <i>Best Doctors</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life, A&S) 1 FP Canada – PK 1 MFDA – PD
2:30 PM	Break		
2:45 PM	Affording Senior Living Amanda Richards, <i>Chartwell Retirement Residences</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life, General) 1 FP Canada – FP 1 MFDA – PD
3:45 PM	Break		
11:30 AM	Understanding Assuris Protection Adrien Bonhomme, <i>Assuris</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life, A&S) 1 FP Canada – FP 1 MFDA – PD

Continuing Education Glossary

FP Canada Approved CE:

FP – Financial Planning, PM – Practice Management, PK – Product Knowledge, PR – Professional Responsibility

MFDA Approved CE:

PD – Professional Development, BC Ethics – Business Conduct Ethics, BC – Business Conduct Other

AIC – Alberta Insurance Council

2024 Virtual Fall Summit

NOV 19 & 20, 2024 | 11 AM – 5PM EST



EVENT SCHEDULE

Day Two: Wednesday, Nov. 20 (All times are in EST)

11:00 AM	A White Sheet of Paper Approach for a Decade Full of Surprises Jonathan Lo, <i>AGF Investments</i> on behalf of <i>Beneva</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life) 1 FP Canada – FP 1 MFDA – PD
12:00 PM	Break		
12:15 PM	Managing your E&O Risk – Let's Talk Claims Margaret Mede, <i>AXIS</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life, A&S, General) 1 FP Canada – PM 1 MFDA – BC
1:15 PM	Break		
1:30 PM	Navigating the Canadian Public/Private Healthcare Landscape David Roberts, <i>Group Medical Services</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life, A&S) 1 FP Canada – PK 1 MFDA – PD
2:30 PM	Break		
2:45 PM	Why Advisors Need To Understand Pension Laws For Their Business Clients Jean Pierre Laporte, <i>INTEGRIS Pension Management</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life) 1 FP Canada – FP 1 MFDA – PD
3:45 PM	Break		
4:00 PM	What, Me Worry? Cybersecurity and the Independent Financial Professional Roberta Tasson, <i>Magnes Group</i>		1 Life (ON, SK) 1 Life/A&S (BC, MB) 1 AIC (Life, General) 1 FP Canada – FP 1 MFDA – BC

Continuing Education Glossary

FP Canada Approved CE:

FP – Financial Planning, PM – Practice Management, PK – Product Knowledge, PR – Professional Responsibility

MFDA Approved CE:

PD – Professional Development, BC Ethics – Business Conduct Ethics, BC – Business Conduct Other

AIC – Alberta Insurance Council