

EVENT SCHEDULE

Day One: Wednesday, Nov. 19

(All times are in EST)

11:00 AM	Update on the U.S. Markets and Socio-Political Issues in Washington Greg Valliere & Mike Archibald, <i>AGF Investments</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – FP 1 AIC – Life
12:00 PM	Break	
12:15 PM	Probategeist: A Nightmare of Horrors When Estate Plans Get Massacred Mark O'Farrell, <i>CICEA</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – FP 1 AIC – Life
1:15 PM	Break	
1:30 PM	From Advisors to Advocates: Redefining Support Through Strategic Partnerships Amanda Richards, <i>Chartwell Retirement Residences</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – FP 1 AIC – Life, A&S
2:30 PM	Break	
2:45 PM	Life and Health Insurance Safety Net: Understanding Policy Protection Adrian Bonhomme & Stephanie Greer, <i>Assuris</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – FP 1 AIC – Life, A&S
3:45 PM	Break	
4:00 PM	Practice Tips & Tricks for Managing Cyber and Liability Risks Margaret Mede, <i>AXIS Capital</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – PM 1 AIC – Life, A&S, General

Continuing Education Glossary

FP Canada Approved CE:

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

AIC – Alberta Insurance Council

EVENT SCHEDULE

Day Two: Thursday, Nov. 20

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11:00 AM	Global Medical Care – Empowering Healthcare for Canadians Rohit Sharma, <i>Best Doctors Canada</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – PK 1 AIC – Life, A&S
12:00 PM	Break	
12:15 PM	AI Essentials: Four Practical Tools for Financial Advisors Dave Faulkner, <i>VibePlan</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – PM 1 AIC – Life
1:15 PM	Break	
1:30 PM	Private Markets and Portfolio Management Partnerships for Advisors Nick Dooley, <i>Kinsted Wealth</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – pending 1 AIC – Life
2:30 PM	Break	
2:45 PM	Empowering Advisors with AI: Faster Sales, Stronger Relationships, Better Results Richard S. Pyper & Kevin Pledge, <i>Monarch Wealth</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – pending 1 AIC – Life
3:45 PM	Break	
4:00 PM	What You Don't Know About Pension Plans Will Cost Your Clients Dearly Jean-Pierre (JP) Laporte, <i>INTEGRIS Pension Management</i>	1 Life – ON, SK 1 Life/A&S – BC, MB 1 FP Canada – FP 1 AIC – Life

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