IFB NATIONAL SUMMIT
OCTOBER 28 & 29, 2026

AGENDA

DAY ONE: WED. OCT 28
8 AM - 5 PM

Time	Session	Accreditation
8:00 AM	**Registration & Breakfast**	
9:00 AM	**Adding Value to Client Conversations Through Assuris Protection** Adrien Bonhomme, *Assuris*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life, A&S
10:00 AM	**Coffee Break**	
10:15 AM	**Leveraging Financial Planning Software to Unlock Business Opportunities** Mike Logashov, *RazorPlan*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life
11:15 AM	**Networking Break**	
11:30 AM	**The Financial Advisor's Senior Care Toolkit** Amanda Richards, *Chartwell Retirement Residences*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life, A&S
12:30 PM	**Lunch Break**	
1:30 PM	**The Complexity of a Complete Financial Protection Strategy** Marie-Michèle Duchesneau, Louis-Charles Laliberté, & Alex Mustafa, *TourMed/Humania*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life, A&S
2:30 PM	**Coffee Break**	
2:45 PM	**Global Medical Care Worldwide: Understanding Health Care Choices** Sona Sargis & Rohit Sharma, *Best Doctors Canada*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - General 1 MFDA - ProD 1 AB - Life, A&S
3:45 PM	**Networking Break**	
4:00 PM	**Navigating the Exempt Securities Capital Market** Peter Jarman, *Axcess Capital*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life, A&S

**Schedule and/or session order subject to change.*

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AGENDA

DAY TWO: THUR. OCT 29
8 AM - 1:30 PM

Time	Session	Accreditation
8:00 AM	**Exhibit Area Open & Breakfast**	
9:00 AM	**Where Do We Go From Here? Embracing Technology to Attract Tomorrow's Insurance Clients** Richard S. Pyper & Kevin Pledge, *Monarch Wealth*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life
10:00 AM	**Networking Break**	
10:15 AM	**Modelling the Power of Personal Pension Plans for Entrepreneurial Clients: Recent Developments in Planning Software Upgrades** Jean-Pierre Laporte, *Integris Pension Management Corp*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life, A&S
11:15 AM	**Coffee Break**	
11:30 AM	**The Next Wave of Advisor Liability: AI, Cybercrime, and Documentation Failures** Joanna Reid & Theresa Mukoyi, *Willis Canada Inc*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life, A&S
12:30 PM	**Building Permanent Clients in the Coming Benefit Plan Boom** Mark Kempf, *KEMPF*	1 Life (ON, SK) 1 Life and/or A&S (BC, MB) 1 FP Canada - FP 1 MFDA - ProD 1 AB - Life, A&S
1:30 PM	**Event Concludes**	

Continuing Education Glossary

FP Canada Approved CE
FP: Financial Planning, **PR:** Professional Responsibility, **General** (Product or Practice Management)

MFDA Approved CE
ProD: Professional Development, **BC Ethics:** Business Conduct Ethics, **BC:** Business Conduct Other

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