IFB OTTAWA CONFERENCE
SEPTEMBER 24, 2026

AGENDA

12 PM - 5 PM

Marconi Centre, Main Hall

12:00 PM	Registration & Coffee	
1:00 PM	**The Psychology of Transition: Why Seniors Delay Care Decisions and How Advisors Can Help** Amanda Richards, Chartwell	0.5 Life 0.5 FP Canada - FP 0.5 MFDA - PD
1:30 PM	Networking Break	
1:45 PM	**Beyond the Ledgers: Building Deeper Client Relationships That Drive Lasting Value** Richard Pyper, Monarch Wealth	0.5 Life 0.5 FP Canada - FP 0.5 MFDA - PD
2:15 PM	Networking Break	
2:30 PM	**The Assuris Safety Net: Leveraging Policyholder Protection to Build Confidence** Adrien Bonhomme, Assuris	0.5 Life 0.5 FP Canada - FP 0.5 MFDA - PD
3:00 PM	COFFEE BREAK	
3:15 PM	**A Secure Way to Secure Your Savings** Sheldon Solomon, Hometrust	0.5 Life 0.5 FP Canada - PK 0.5 MFDA - PD
3:45 PM	**The Great Advisory Reset: Winning Through Change, Technology and Succession Planning** Fadia Mankal, IG Wealth Management	0.5 Life 0.5 FP Canada (pending) 0.5 MFDA (pending)
4:15 PM	Networking Break	
4:30 PM	**Protecting Your Practice: Claims Insights, Risk Management Strategies and E&O Essentials** Joanna Reid, WTW Canada	0.5 Life 0.5 FP Canada (pending) 0.5 MFDA (pending)

CE Glossary: FP Canada Approved CE - Financial Planning (FP), Practice Management (PM), Product Knowledge (PK), Professional Responsibility (PR)