



2022 Toronto Fall Summit - Pearson Convention Centre

Day 1: November 8, 2022, 8:00 a.m. - 5:00 p.m.

8 - 9 a.m.	Registration and Coffee
9:00 a.m.	The Financial Services Regulatory Authority Update <i>Erica Hiemstra, Robert Prior, and Wendy Horrobin, FSRA</i> 1.00 Life 1.00 FP Canada: Practice Management (#12021) 
10:00 a.m.	Coffee Break
10:15 a.m.	A Secure Way to Grow Your Savings <i>Sheldon Solomon, Home Trust</i> 1.00 Life 1.00 FP Canada: Product Knowledge (#11925) 
11:15 a.m.	Break
11:30 a.m.	Let's Simplify it! Breaking Down Concepts of Living Benefits <i>Ariana Kane, Humania Assurance</i> 1.00 Life 1.00 FP Canada: Product Knowledge (#11993) 
12:30 p.m.	Lunch
1:30 p.m.	Understanding Care and Support Options in Canadian Retirement Homes <i>Amanda Richards, Chartwell Retirement Residences</i> 1.00 Life 1.00 FP Canada: Financial Planning (#11997) 
2:30 p.m.	Coffee Break
2:45 p.m.	Financial Advisory M&A: Financing as a Strategic Option <i>Tom de Larzac & Pierre Sauvé, CWB Maxium Financial</i> 1.00 Life 1.00 FP Canada: Practice Mgmt. (#11920) 1.00 RIBO Mgmt. 
3:45 p.m.	Break
4:00 p.m.	What, Me Worry? Cybersecurity and the Independent Financial Professional <i>Roberta Tasson, The Magnes Group</i> 1.00 Life 1.00 FP Canada: Practice Mgmt. (#11998) 1.00 RIBO Technical 



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Day 2: November 9, 2022, 8:00 a.m. - 4:00 p.m.

8 - 9 a.m.	Registration and Coffee
9:00 a.m.	Recent Trends in E&O Claims <i>Grace Leung, Axis Reinsurance</i> 1 Approved CE FP Canada 1.00 Life 1.00 FP Canada: Practice Mgmt. (#11999) 1.00 RIBO Technical
10:00 a.m.	Coffee Break
10:15 a.m.	Navigating the Changes to Healthcare in Canada <i>Deep Bajwa, Best Doctors Canada Insurance Services Inc.</i> 1 Approved CE FP Canada 1.00 Life 1.00 FP Canada: Product Knowledge (#11919)
11:15 a.m.	Break
11:30 a.m.	The Power of Pension Laws <i>Jean Pierre Laporte, INTEGRIS Pension Management Corp.</i> 1 Approved CE FP Canada 1.00 Life 1.00 FP Canada: Financial Planning (#11926)
12:30 p.m.	Lunch
1:30 p.m.	CRM: Best Practices: 5 Ways to Build your Book of Business <i>Brad Hartfield, Maximizer</i> 1 Approved CE FP Canada 1.00 Life 1.00 FP Canada: Practice Mgmt. (#11922)
2:30 p.m.	Break
2:45 p.m.	Are You Ready to Exit? <i>Roland Chan, FindBob</i> 1 Approved CE FP Canada 1.00 Life 1.00 FP Canada: Practice Mgmt. (#11996)