

INSTITUTE OF ADVANCED FINANCIAL PLANNERS

DAY 1 PROGRAM AGENDA - **ADVANCED EDUCATION DAY**: WEDNESDAY, SEPTEMBER 22, 2021 (*Agenda is Mountain Time*)

TIME (Mountain)	TOPIC	CATEGORY	SPEAKER	ORGANIZATION SPONSOR
8:00 - 8:10	Opening Remarks		Peter Cishecki, President and Financial Advisor	Everything Financial Group
8:15 - 8:55	Wealth Management in a Digital World	Investment Planning	Howard Atkinson, Chief Executive Officer, Pascal WealthTech	Pascal WealthTech
9:00 - 9:40	The U.S., the biggest economy in the world, and how it affects us	Investment Planning	Greg Valliere, <i>Chief U.S. Policy Strategist</i> Kathy McMillan, Director, Wealth Management & Portfolio Manager	AGF Investments
9:45 - 10:00	Mini Yoga Session		Tayler Sawchuck, certified Yoga and Fitness Instructor	Lightwork Wellness
10:05 - 10:40	Maximizing income in a zero interest rate environment.	Investment Planning	Bob Sewell, President and CEO, Bellwether	Bellwether Investment Management
10:45 - 11:20	Simplifying your business to maximize the value.	Practice management	Steve Meehan, Chairman	Bellwether Investment Management
11:20 - 11:55	Lunch - Sponsor Showcase - visit the sponsor virtual booths			
12:00 - 1:00	Global Macro View - Jurrien will dive in-depth into the drivers of global economies and what investors can expect in the year ahead.	Investment Planning	Jurrien Timmer, Director Global Macro	Fidelity Investments Canada ULC
1:05 - 2:05	Your Other Portfolio - Investing in your life-physically, socially and with purpose!	Practice Management	Dr. Roger Landy, Preventive Medicine Physician	Masterpiece Living
2:10 - 2:50	Finding Purpose - Som will walk through his journey in Canadian financial services.	Investment Planning	Som Seif, CEO	Purpose Investments Inc.
2:55 - 3:35	Registered Disability Savings Plans	Tax Planning	Carol Bezaire, <i>Vice President of Tax, Estate and Strategic Philanthropy</i>	Mackenzie Investments
3:40 - 4:20	Staying one step ahead of the cybercrime pandemic	Practice Management	Scott Stennett, <i>Chief Operating Officer and a Director</i>	Richardson Wealth Limited
4:20 - 4:25	Break			
4:30 - 5:10	Sustainable Responsible Investing	Investment Planning	Baris Ozyetis, Assistant Vice President (AVP), Sustainable Investing Solutions	Mackenzie Investments

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DAY 2 PROGRAM AGENDA - SYMPOSIUM: THURSDAY, SEPTEMBER 23, 2021 (Agenda is *Mountain Time*)

TIME (<i>Mountain</i>)	TOPIC	CATEGORY	SPEAKER	ORGANIZATION SPONSOR
8:00 - 8:15	Introduction of Symposium Sessions and Case Study		Terry Ritchie, VP, Private Wealth Manager, Partner	Cardinal Point Capital Management
8:20 - 9:20	Round Table Discussions - Case Study	FP Fundamentals		IAFP
9:25 - 10:25	Communicating effectively to enhance the transfer of financial wisdom and appeal to generational values	Practice Management	Jenna Silverberg, Graeme Wach & Brandi Mills	Dalhousie University
10:25 - 10:35	Break			
10:40 - 11:40	The Experience Economy - the only unique competitive advantage is the exceptional experience a business can create for their clients.	Practice Management	Dennis Moseley-Williams, Experience Economy Specialist	KEYNOTE SPEAKER
11:40 - 12:00	Break - Mini Yoga Session		Taylor Sawchuck, certified Yoga and Fitness Instructor	Lightwork Wellness
12:05 - 1:05	All about Integrity	IIFROC Compliance	Rod Burylo, International speaker and commentator	BREAKOUT SESSION
12:05 - 1:05	How to Build Trust, Convert More Prospects & Grow Your AUM with Financial Planning	Practice Management	Alex Mercer, Product Specialist David Buye, Onboarding Specialist	BREAKOUT SESSION - SNAP
12:05 - 1:05	Your Clients Don't Feel Engaged: Creating and Implementing a Winning Communication Strategy	Practice Management	Ariel Kutcher, Regional Sales Manager-Canada	BREAKOUT SESSION - Ychart
1:05 - 2:05	Sponsor Speed Dating Lunch		Join your assigned Virtual Zoom Room	
2:10 - 3:10	Estate Planning In the Pandemic: Wills and Powers of Attorney for Business and Blended Families	Estate Planning	Rachel Blumenfeld, Partner	Aird and Berlis LLP
3:10 - 3:20	Break			
3:25 - 4:25	Ethics and Social Media	FP Canada Professional Responsibility & IAFP Ethics	Rod Burylo, International speaker and commentator	
4:40 - 5:40	Applying Ethics: Business Continuity and Succession Planning	FP Canada Professional Responsibility & IAFP Ethics	Rod Burylo, International speaker and commentator	

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DAY 3 PROGRAM AGENDA - SYMPOSIUM: FRIDAY, SEPTEMBER 24, 2021 (*Agenda is Mountain Time*)

TIME (Mountain)	TOPIC	CATEGORY	SPEAKER	ORGANIZATION SPONSOR
7:00 - 7:10	Introduction of Symposium Sessions		Terry Ritchie, VP, Private Wealth Manager, Partner	Cardinal Point Capital Management
7:10 - 8:10	Taxation after Covid! Recent Tax Updates	Tax Planning	Peter Bowen, Vice President, Tax and Retirement Research	Fidelity Investments Canada ULC
8:15 - 9:15	The \$1000 juicer	Practice Management	Kevin Cork, President	<i>TheAbsoluteGroup.com</i>
9:20 - 10:20	Modern.....Family Conception: Fertility Law and Reproduction Technology in Canada	Client Counselling	Shirley Levitan, Family and Fertility Law	Shirley Eve Levitan Barrister & Solicitor
10:20 - 10:40	Break			
10:45 - 11:45	The Evolution of Life/Complex Insurance Distribution	Insurance Planning	Aly Dhalla, CEO & Co-Founder	BREAKOUT SESSION - Finaeo
10:45 - 11:45	Tech-Enabled Practices Come Out on Top: Impress Clients & Drive Sales	Practice Management	James Rockwood, CEO & Founder	BREAKOUT SESSION - Capintel
10:45 - 11:45	Transforming the Wealth Planning Experience	Practice Management	Tarsem Basraon, Co-Founder & CEO James Fraser, Co-Founder	BREAKOUT SESSION - Planworth
11:50 - 12:50	Identifying Insurance Needs and an Introduction to Financed Life Insurance	Insurance Planning	Brian Laundry, Industry-leading Insurance Expert	Brian Laundry Insurance Solutions
12:50 - 1:10	Break - Mini Yoga Session		Taylor Sawchuck, certified Yoga and Fitness Instructor	Lightwork Wellness
1:15 - 2:15	Estate Planning: Doing nothing is an option, but not necessarily the best option	Tax and Estate Planning	Diane Everett, <i>Vice-President, Planning Services</i> Glenn Stephens, <i>Vice-President, Planning Services</i>	PPI
2:15 - 3:45	Sponsor Speed Dating Lunch		Join your assigned Zoom Room	
3:50 - 4:50	A Cross-Border Financial, Tax & Estate Planning Update	Tax Planning	Terry Ritchie, VP, Private Wealth Manager, Partner	Cardinal Point Capital Management
4:50 - 5:00	Break & GRAND PRIZE ANNOUNCEMENT			
5:05 - 6:05	Chocolate Tasting- a Fun and Interactive chocolate education and tasting experience	Decadent Fun -	Oliver Woodburn, The Tasting Tutor	Entertainment