

***Proving and Improving Your Value –
Thursday, September 15th, 2011***

Hellenic Community Center, Prince of Wales Dr., Ottawa

FULL DAY PROFESSIONAL DEVELOPMENT EVENT

Note: We are applying for 6 CE credits for the day

- 7:30 AM - 8:00 AM Hot breakfast & registration
Note: Breakfast will be available until 8:30 am
- 8:00 AM – 8:10 AM Opening Remarks
- 8:10 AM – 9:40 AM **Protect Your Practice (Part I)** – Lise Martens, Desjardins Financial Securities
This session will help you effectively understand Errors & Omissions insurance and how to implement best practice processes to protect against the risk of claims. (This session has been pre-approved by Advocis for 1.5 CE Credits)
- 9:40 AM - 10:40 AM **A Peek Inside Your Client’s Mind** – Robert Gignac, Taynac & Associates
If you are going to help your clients achieve their goals, enrich their lives, and discover new horizons – how do we accomplish that? “A Peek Inside Your Client’s Mind” is not just about being a better advisor; it is about having a greater impact on your most important asset – your client.

A special **GIFT** will be provided!
- 10:40 AM - 10:45 AM Coffee Break
- 10:45 AM - 11:45 AM **The One Page Business Plan: You Don’t Need More Time... You Just Need to Decide!** – Simon Reilly, Leading Advisor. What is your greatest asset? Is it money, time or energy? – It is your consciousness!

Whether on paper or in their head, business people that don’t have a business plan keep going over the same to-do list or “stuff” over and over again, and that sucks up their valuable consciousness reminding themselves of what they have to do without making a decision about what actions to do next leaving them overwhelmed.
- 11:45 AM - 12:15 PM **Fearless Referrals: How to get More and Better Referrals Through Customer Service by Asking in a Way that’s Comfortable for You** – Matt Anderson, The Referral Authority
Everybody says that referrals are their favourite way to get new business. Yet most people aren’t good at generating the referrals they want. If it was really that easy, everyone would already be doing it.
- 12:15 PM – 1:00 PM Lunch & Milestones Presentations

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- 1:00 PM – 2:00 PM **Segregated Funds – Careful Planning to Avoid those Unanticipated Situations** – Lea Koiv, Standard Life
 With Canada’s aging population there is an increased focus on estate planning. Segregated funds warrant consideration in this context, however contracts need to be appropriately structured so that the funds will ultimately go to the intended parties. This session provides an overview of many tips and traps to help avoid unintended consequences!
- 2:00 PM – 3:30 PM **Protect Your Practice (Part II)** – Lise Martens, Desjardins Financial Securities
 This session will help you effectively understand Errors & Omissions insurance and how to implement best practice processes to protect against the risk of claims.
- Note: This session has been pre-approved by Advocis for 1.5 CE Credits
- 3:30 PM Adjournment

2011 PD Day Fees

Full-Day Fee:	\$55 per PD Day for Chapter members; \$65 after September 8 th
	\$65 for other-Chapter members; \$125 for non-members
Update 2011 (October 20th)	\$130 for Advocis members; \$250 for non-members

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