

UPDATE 2011

Financial Advisors and Planners Professional Practices Review



Agenda

Advocis® Ottawa

Thursday,
Oct. 20, 2011

Hampton Inn

7:30 am breakfast
8:00 am program

8:00	Welcome (David Sissing) & Introduction by Moderator	Terry Zive
45 min.	The Power of Integrated Financial Planning	Scott Beckett
45 min.	Case Study Introduction Integrated Planning for a High Net-Worth Business Owner Case Study Exercise: Broad Concepts Questioning	
9:30 – 9:40	10 min. BREAK	
40 min.	Preserving Wealth within Complex Family Relationships	Christine Van Cauwenberghe
30 min.	Case Study Exercise: Preserving Family Wealth	
10:50	10 min. BREAK	
35 min.	Protecting Family Wealth for Older Clients	Kathryn Bennett
25 min.	Case Study Exercise: Incapacity Planning	
11:50 – 12:50	LUNCH & Guest Speaker - Gordon Laight, RBC Global Asset Management	
12:50 – 1:00	PAC Update (Dave McGruer)	
35 min.	Strategies for Transferring Family Wealth	Kathryn Bennett
35 min.	Case Study Exercise: Transferring Family Wealth	
2:10	15 min. BREAK	
40 min.	Corporate-Owned Life Insurance: An update for business Owners	Kevin Wark
25 min.	Case Study Exercise: Preserving Business Interests	

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3:30 p.m.

CLOSE

Please note you must be present for all presentations in order to receive full CE credits. There is a maximum of 12.5 pre-approved credits for these presentations and the online component (6.5 CE credits for seminar attendance and 6 for self study). For Quebec PDU's there are 2 PDU's (sector 5), 2 (sector 1) and 2 (Sector 2) for a total of 6 PDU's for attending and 6 PDU's for self study. We are applying for one additional CE/PDU credit for the luncheon speaker.

A special thank you to all of our sponsors for their support of our Program and for donations of door prizes and other items.

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