9:00 a.m.

IDC WIN | Opening Remarks

Greg Osmak, Executive Vice President

CANADA LIFE | Underwriting, Claims and Large Case Help

Dr. Bruce Empringham, Medical Consultant

Dr. Bruce will help clarify the way you can help your clients get through the underwriting process more smoothly. It all starts with you and your field underwriting. If you can understand your client's risks then you can help the underwriter understand. We'll also discuss insuring specific conditions and finally, how Dr. Bruce and his team can help you with your jumbo cases from start to finish.

10:00 a.m.

MANULIFE | Market landscape – Life and living benefits overview

Scott Ife, Head of Product Strategy & Support, Individual Insurance

Current industry trends, results and the impact on insurance sales and product development.

11:00 a.m.

EQUITABLE LIFE | Announcements on new UL, S&R product lines and Par WL for kids

Dean Erickson, VP Sales, Western Canada (Introduction)
Christine Watts, Regional Sales Manager (Juvenile Policies)
Barb Tluchak, Regional Investment Sales Manager (S&R Announcements)

Hear this year's highlights, along with an introduction to a new UL plan. There will be a sales concept on selling Par Whole Life for kids and we will wrap it up with some exciting savings and retirement changes. Equitable Life is number one in issuing PAR policies in Canada and this is almost entirely due to Juvenile policies. Hear how Equitable Life gets this done.

12:45 p.m.

SUN LIFE | Bolstering the Balance Sheet

Jason Leveille, CFP, CIM, MBA, Regional Sales Director – BC and Prairies
Renee Ho, BA, CHS, Regional Sales Director – BC and Prairies

In most cases, it is the mindset that causes roadblocks, not a well-formulated financial plan. The presentation focuses on the mindset of a typical client. It outlines all of the individuals involved in influencing their point of view and then evolves into changing the thought pattern around viewing insurance as an expense to seeing it as an asset, using language that can speak to the client's most influential voice – their accountant. Please join us for a discussion on the realities around decision-making for clients and how to help influence the influencers in a language they utilize.

1:45 p.m.

RBC | Immediate Financing Arrangements and Life Insurance

Mitchell Singer, B.Sc., LL.B., Director, Taxation and Estate Planning

The purpose of the presentation is to give advisors a better understanding of the '*who, what, when, why and how*' of IFAs. We will explore the history of IFAs and where we are today. Advisors will get a better understanding of how they work and how to identify clients for whom these arrangements make sense. They will also glean a more in-depth knowledge of the taxation principles that drive the concept. By exploring a case study, with the ultimate insurance sale in mind, advisors will better understand why this concept drives such large premiums and how to incorporate it into their sales processes. Not to be lost in all of this, will be a better understanding of why whole life is the preferred product for the concept and why RBC is their best choice.

2:45 p.m.

EMPIRE LIFE | Attracting Clients with Bundling Solutions

Tammy Couillard, ACS, AIAA, CHS, Account Executive, Retail Insurance Distribution

Consumers love bundles and bundling pricing. Learn about market behaviour and the key benefits to the client and you as the advisor. We will take you through a three-step approach using Empire Life's insurance products to create customized solutions for today and the future changing needs of your clients.

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