

ATTRACT. ENGAGE. CONVERT.



FALL EDUCATION DAY

📅 Thursday, September 8, 2022

📍 Hilton Garden Inn Montreal Midtown
6939 Decarie Blvd., Montreal QC H3W 3E4

9:00 a.m.

IDC WIN | Opening Remarks

English
Room

Greg Osmak, Executive Vice President

Mandarin
Room

Samuel Chan, Vice President, Asian Market

English

RBC INSURANCE | RBC Disability Insurance and Construction Workers

Ardy Heidari, Senior Sales Consultant

The different types of disability insurance contracts available in the market as well as the definitions, limitations and integrations. Additionally, we will focus on the RBCI offer for construction workers and other available discount opportunities.

Mandarin

BMO | Guaranteed Investment Funds-GIFs and Current Market Trends

David Hsu, Vice President, Regional Sales, Intermediary Distribution
Caroline Yong, Senior Business Development Manager, Segregated Funds & Annuities, Eastern Canada

Protect and grow your clients' portfolios using BMO segregated fund solutions offering guarantees that use BMO ETFs and BMO ETF Portfolio Solutions.

10:00 a.m.

English

MANULIFE | Underwriting Corporate Cases, Tips & tricks to make your life easier!

Marilène Audet, Regional Field Underwriting Consultant- Quebec and Atlantic provinces

Financial underwriting of corporate cases.

10:00 a.m. Mandarin **IDC WIN | Quebec Sales Team: Our Value Proposition**
Henriette Bichai, Vice President, Quebec Region

11:00 a.m. English **IDC WIN | Quebec Sales Team: Our Value Proposition**
Henriette Bichai, Vice President, Quebec Region

Mandarin **IDC WIN | Mid-year Compliance Check**
Eric Wachtel, Chief Compliance Officer

Join us as we look at IDC WIN's sales and practice management tools to help you grow your business and stay compliant.

12:45 p.m. English **IDC WIN | Mid-year Compliance Check**
Eric Wachtel, Chief Compliance Officer

Mandarin **EQUITABLE LIFE | IFA Workshop**
Jeff Tse, BCom, CFP, Regional Sales Manager

This presentation will cover the best practices for the IFA strategy: pros and cons, finding qualified clients, the process (from prospecting to funding), and lending options.

1:45 p.m. English **iA FINANCIAL GROUP | Economic overviews, expectations and outlook and iA PAR as an alternative to fixed income – the ForLife series**
Sébastien Mc Mahon, VP, Asset Allocation, Chief Strategist, Senior Economist and Portfolio Manager
Mark Holden, Sales Director, General agents, Quebec and Atlantic Provinces
Michel Assouad, Sales Director, Large Case and National Accounts, Quebec and Atlantic Canada

Navigating the Current Market: Economic overview and sales strategies: Join us as we deliver expert insights into the latest market trends to help you guide your clients to make informed decisions when it comes to insurance and investment. In this presentation, we will discuss the outlook for the global economy in terms of global risk, inflation and rising rates. In addition, we will present data-driven strategies for identifying the sector's prime growth markets with long-term growth potential. As an alternative to fixed income, we will also share strategies and sales concepts for using Participating Life Insurance.

Mandarin **CPP | The one-stop solution for the family market**

Dora Wang, Regional Vice President, Asian Markets – Eastern Canada

Presenting three 20-minute segments including Foresters PAR overview for healthy clients, CPP Simplified issue product overview for substandard clients and Foresters Member benefits.

2:45 p.m. English

SUN LIFE | Life Insurance and the Wealthy

Helen Chow, FSA, AVP, Strategic Business Development & Marketing Actuary

Busting two common myths about insurance for the wealthy:

1. The wealthy do not need insurance.
2. Insurance is a bad investment.

Studies show the wealthy prefer to hold a lot of safe assets to protect their capital. Diversifying into Par insurance can improve the efficiency of their portfolio.

Mandarin

SUN LIFE | Life Insurance and the Wealthy

Jia Hao He, B.Sc., Insurance Sales Representative, Eastern Region
