ATTRACT. ENGAGE. CONVERT.

FALL EDUCATION DAY

Thursday, September 15, 2022

Terminal City Club
837 West Hastings Street, Vancouver BC V6C 1B6

IDC WORLDSOURCE
INSURANCE NETWORK INC.

9:00 a.m.	Room 1,2	***IDC WIN	Opening Remarks*** ***Greg Osmak,*** Executive Vice President
	Room 1	***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.
	Room 2	***INDUSTRIAL ALLIANCE	Roadmap to Success with iA*** ***Rishu Bains,*** CHS, Director of Sales – Life ***Hilda Ng,*** CIM, Director of Sales - Investments Explore the most flexible shelf of Life and Living Products: from families to business owners, let's talk opportunities, growth and continuing the needs conversation.
10:00 a.m.	Room 1	***CANADA LIFE	Working Together in Partnership: Recipe for Success*** ***Andrea Solomon,*** Senior Underwriting Consultant, Individual Insurance New Business, Individual Customer Join us for a look at our team of underwriting experts (large case and aligned) and their common approach in the field of financial underwriting for life insurance products.

10:00 a.m. Room 2

BMO | Managing Risk and Uncertainty with IFA's: Tips, Traps and Best Practices

Pierre Ghorbanian, MBA, CFP, TEP, Business Development Director, Advanced Markets

With the industry spotlight and advisor focus on Immediate Financing Arrangements, this presentation examines the concept in greater detail with specific attention and critical focus on the policies we offer our clients and the loans they receive. In addition, the presentation will review the best practices and help provide useful tips and how to avoid the common traps associated with the IFA concept.

11:00 a.m. Room 1

SUN LIFE | Bolstering the Balance Sheet

Jason Leveille, CFP, CIM, MBA, Regional Sales Director – BC and Prairies
Jenny Chan CFP, CLU, Regional Sales Director

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.

Room 2

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.

12:45 p.m. Room 1

EMPIRE LIFE | Attracting Clients with Bundling Solutions

Leslie Carpenter, CFP, CLU, CIM, Account Executive, Insurance, BC

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.

Room 2

DFS | Estate Planning – Unleashing Client Opportunities

Petra Ross, B.Comm, CHS, Regional Sales Director, BC Region

The presentation focuses on the estate planning market, approaches to uncovering opportunities, showcasing tools that can help in the conversation, and outlining strategies that can help advisors ensure their clients future-proof their estate planning needs and sleep well at night.

1:45 p.m. Room 1

EQUITABLE LIFE | A Deep Dive into Par Whole Life

Dean Erickson, VP Sales, Western Canada (Introduction)
Mike Rickets, Regional Investment Sales Manager (S&R Announcements)

Announcements on new UL and S&R product lines. Equitable Life is #1 in issuing PAR policies in Canada and this is almost entirely due to Juvenile policies. Listen to how Equitable is getting this done.

Room 2

CPP/FORESTERS | Stronger Together: Grow Your business & make a positive impact

Shirley Su, CHS, Regional Vice President, British Columbia

Canada Protection Plan has now been a Foresters Financial company for more than a year, and what an incredible experience it has been. As an organization that's driven to share rather than shareholder-driven, it means that together we can better serve you, our members and the communities we live in; it means giving back in a meaningful way through our exclusive member benefits and rewards. For example, did you know that over the past year, we granted over 700 scholarships to young leaders? Because we believe that fostering learning in the younger generation will shape a better tomorrow for all of us! We are looking to create opportunities to help you grow your business and to increase the positive impact we can make in our communities.

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