

## 2011 Planning School

### Fast Forward – Anticipating Trends to Maintain a Successful Financial Practice

#### AGENDA

#### Day 1—Tuesday, October 25, 2011

8:00 am	Hot Breakfast and Registration
9:00 am – 12:30 pm	Opening Comments— <i>with David Chalmers</i> <b>Speaker 1:</b> <i>Byren Innes</i> —Megatrends Impacting your Business <i>Morning Break</i> <b>Panel Discussion:</b> The Future Rules and Regulations for the Advisor and the MGA Participants: <i>Chris Di Salle, Sandra Jakab, John Lutrin, and Gerry Matier</i> Moderator: <i>Warren Campbell</i> <b>Speaker 2:</b> <i>Carmen Theriault</i> —Update on the new <i>Wills, Estates and Succession Act, Power of Attorney Act Changes and Family Law Reform</i>
12:30 pm	<i>Lunch</i>
1:15 pm – 4:45 pm	<b>Speaker 3:</b> <i>Rob Edel</i> —Economic and Market Outlook <b>Speaker 4:</b> <i>Lori Mathison</i> —Snowbirds - Investing and Spending Time Outside of Canada <i>Afternoon Break</i> <b>Speaker 5:</b> <i>Grant Burville and Mike Dunbar</i> —Leveraged Life Insurance Strategies <b>Speaker 6:</b> <i>Anurag Gupta</i> —Simplifying your Business and your Life
4:45 pm	Wrap up Day 1
4:50 pm	Networking Reception

#### Day 2—Wednesday, October 26, 2011

8:00 am	Hot Breakfast and Registration
9:00 am – 12:30 pm	Introduction— <i>with David Chalmers</i> <b>Speaker 1:</b> <i>Judi Cunningham</i> —The Family Enterprises and their Challenges <i>Morning Break</i> <b>Speaker 2:</b> <i>Michael Haywood</i> —Business Succession Planning for Professional Businesses <b>Speaker 3:</b> <i>Len Colman</i> —To Fee or Not to Be: Fee Versus Commission Compensation
12:30 pm	<i>Lunch</i>
1:15 pm – 4:45 pm	<b>Speaker 4:</b> <i>Jim Otar</i> —Advanced Retirement and Distribution Planning <b>Speaker 5:</b> <i>Duncan Robinson</i> —Why MDRT <i>Afternoon Break</i> <b>Speaker 6:</b> <i>Daryl Clegg</i> —Where We Were, Where We are, Where We are Going <b>Speaker 7:</b> <i>Shane Gibson</i> —How to Win with Social Media - The Rules and Tools of Engagement
4:45 pm	Closing Comments