Advocis® Greater Vancouver

March 8, 2018
Hyatt Regency Vancouver

Financial Planning Summit

EDUCATION FOR FINANCIAL PLANNING PROFESSIONALS

Welcome Message

Dear Summit Participants,

As Chair of the first Financial Planning Summit hosted by the Greater Vancouver Chapter of Advocis, I would like to extend a very warm welcome to all of you.

The Financial Planning Summit is a fresh approach to professional development and the goal is to provide an exciting, educational and motivational experience within a vibrant and energetic environment. You will be exposed to best practices in all areas of financial planning including ethics, tax, estate, risk, investment and retirement planning.

Holistic planning is the wave of the future, and being well rounded in all areas of financial planning has become more important than ever. This summit is designed to provide a landscape of topics that will cover many areas of a comprehensive financial plan. Even if you specialize in only one area, our intention is to provide valuable information that will help you enrich your clients' experience in working with a professional advisor. The speakers have been carefully selected to touch upon each specialized arena and we hope you find takeaways that will either enhance your business or spark an idea to try something new.

While continued education is important, we feel that connecting with your colleagues is equally vital as it helps motivate and inspire us in different ways. Those who will be in attendance have made a choice to better their business and we hope that you can use this platform to network, reconnect and share ideas amongst peers.

Without the support of our valuable sponsors and committee members, an event like this cannot take place. I would like to extend a heartfelt thank you to all those who have contributed their time and sponsorship funds towards this first summit. Last, but certainly not least, we want to thank the advisors who take the time to support Advocis and the events we host.

On behalf of the Financial Planning Summit Committee and Advocis Greater Vancouver Chapter, thank you and we look forward to seeing you at our next event!

Patrick Cziolek, B.Comm, CFP, CLU, TEP, CHS
Regional Sales Manager, Canada Life Assurance Company
Chair, Conference Planning Committee

Agenda

March 8

07:00 AM **DOORS OPEN**

07:30 AM **Welcome, Introductions, and Opening Remarks**
Patrick Cziolek, B.Comm, CFP, CLU, TEP, CHS

07:45 AM **Plenary 1**
Ethics Breakfast: Making Choices
Jos Herman, B.Comm, CPA, CA, CFP, TEP

08:45 AM **Plenary 2**
Risk Management: Financial Planning for Business Owners
Keith Brown, CFP, CLU, CH.F.C, FEA, CExP

09:30 AM **BREAK**

10:00 AM **Plenary 3**
Investment: Assessing the Outlook for Long Term Capital Market Returns
Brent Joyce, CFA

10:45 AM **Plenary 4**
Estate Planning: Identifying Red Flags in Estate Planning
Amy Mortimore, LL.B

11:30 AM **LUNCH**

12:30 PM **Plenary 5**
Retirement Planning: The Order of Spending
Cindy David, CFP, CLU, FEA, TEP

01:15 PM **Keynote**
Tax Update 2018: What Advisors Need to Know
Jamie Golombek, CPA, CA, CFP, CLU, TEP

02:45 PM **BREAK**

03:00 PM **Plenary 6**
Planning Software: The Value of Advice
Dave Faulkner, CLU, CFP

03:45 PM **Closing Comments and Wrap-up**
Patrick Cziolek, B.Comm, CFP, CLU, TEP, CHS

04:00 PM **Cocktail Reception**

Planning Committee

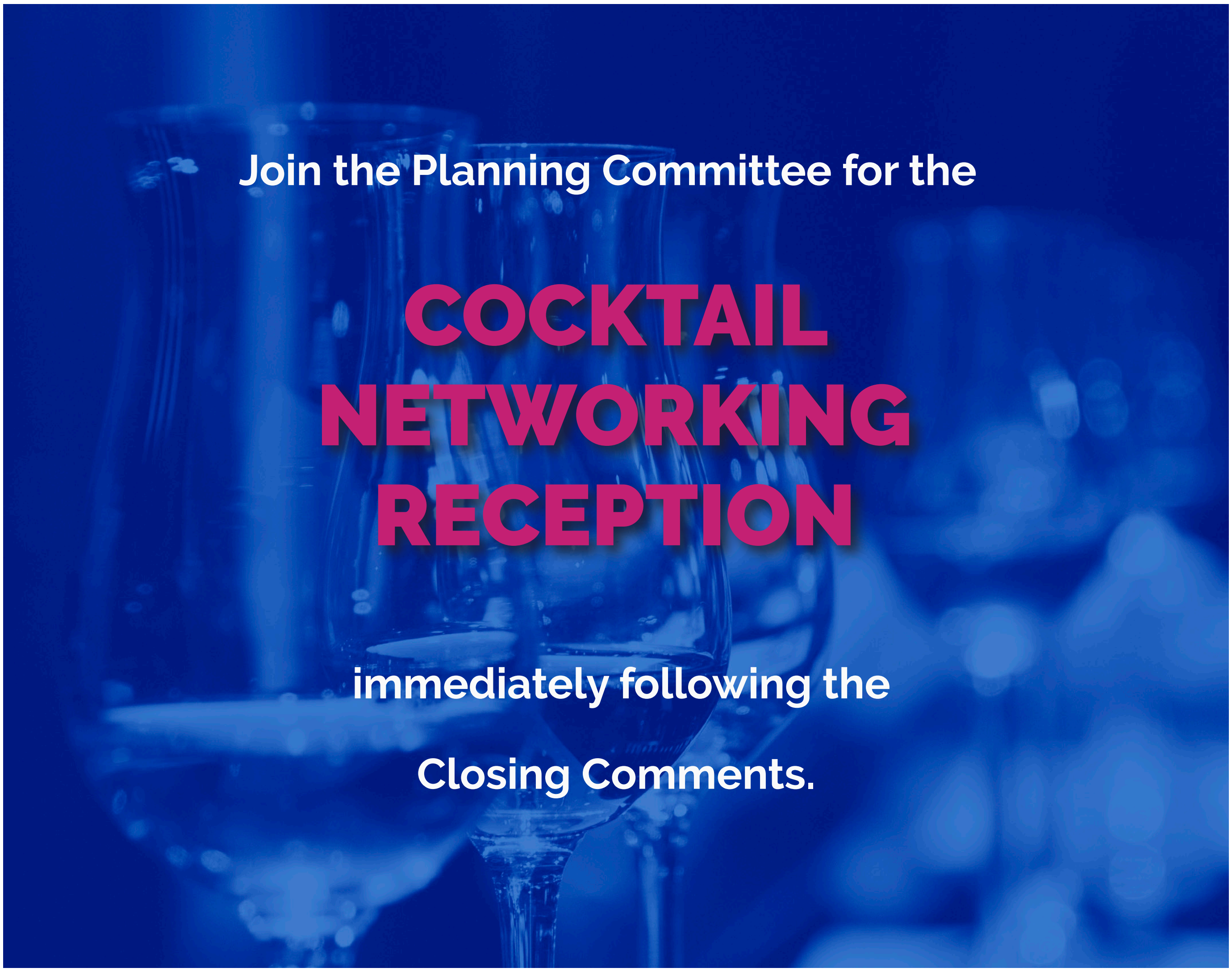
To our amazing Planning Committee members: thank you all for your time, efforts and commitment in helping bring this conference together.

Patrick Cziolek
Canada Life Assurance Company

Jeny Yeung
Industrial Alliance Insurance and Financial Services

Barry Trischuk
Canada Life Assurance Company

Mehul Gandhi
Desjardins Financial Security



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	FINANCIAL PLANNING SUMMIT MASTER OF CEREMONIES	

Vince McKay, EPC, CPCA
Financial Advisor, Essential Financial

Vince McKay started in the financial services industry in 1997 after three years in the military and 12 years overseas running businesses. Vince has been an active volunteer in Advocis Greater Vancouver for many years and has sat as Chair of the Sponsorship, Membership and Program committee before serving as President in 2013. Vince continues his involvement with the Chapter as Sponsorship Chair. Vince is also currently sitting on the National Board of the APA as the chair of the Underwriting Committee.

7:45 AM	ETHICS BREAKFAST: MAKING CHOICES	PLENARY 1

Jos Herman, B.Comm, CPA, CA, CFP, TEP
Wealth & Tax Planning Lead, Canada Life Assurance Company

Jos Herman joined the Wealth and Tax Planning team in 2010. Over the years, Jos has travelled all over North America and to the UK, assisting business owners in growing and selling their businesses.

Jos has been a proud board member of the Canadian Association of Gift Planners and BPW Canada. She is an active member of the Canadian Tax Foundation, Estate and Tax Planning Councils and CALU.

Jos is a Chartered Accountant that specializes in estate and tax planning at Canada Life in complex cases and holds her CFP and Trust and Estate Practitioner (TEP) designations.

8:45 AM	RISK MANAGMENT: FINANCIAL PLANNING FOR BUSINESS OWNERS	PLENARY 2

Keith Brown, CFP, CLU, CH.F.C, FEA, CExP
Founder & President, Financial Confidence Advisors Inc.

Keith Brown is the Founder and President of Financial Confidence Advisors Inc. He is a financial advisor and industry leader in tax and estate planning who helps business owners, executives and their families reach their wealth goals. With over 35 years of retirement, tax and estate planning expertise, Keith helps individuals, families and businesses from a variety of backgrounds and professions identify opportunities, clarify objectives and reduce risk.

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10:00 AM	INVESTMENT: ASSESSING THE OUTLOOK FOR LONG TERM CAPITAL MARKET RETURNS	PLENARY 3

Brent Joyce, CFA
Chief Investment Strategist, GLC Asset Management Group

As Chief Investment Strategist, Brent is responsible for forming and communicating GLC's investment outlook. Brent provides insight into current market and economic conditions for GLC's clients and investment partners across Canada.

10:45 AM	ESTATE PLANNING: IDENTIFYING RED FLAGS IN ESTATE PLANNING	PLENARY 4

Amy Mortimore, LL.B
Partner, Clark Wilson LLP

Amy is Co-Chair of her firm's Estate and Trust Litigation Group. Amy's practice is focused on helping executors, trustees, individuals, trust companies, non-profit organizations and attorneys navigate through the complex world of estate and trust litigation. She represents parties in claims involving wills variation, incapacity, undue influence, validity of wills, committeeship, breach of fiduciary duty and related issues.

Amy received the Best Lawyers in Canada designation in Trusts and Estates, 2017 & 2018.

12:30 PM	RETIREMENT PLANNING: THE ORDER OF SPENDING	PLENARY 5

Cindy David, CFP, CLU, FEA, TEP
President, Cindy David Financial Group Ltd.

With 24 years of financial planning expertise, Cindy David, CFP, CLU, FEA, TEP, is the President of Cindy David Financial Group Ltd., which consults to larger national firms such as Raymond James Ltd., and to numerous group employee benefits brokers and investment consultants such as Bull Wealth. In the fall of 2009, David co-authored the timely book encapsulating the deepest economic downturn the globe has seen in decades: *Financial First Aid for Canadian Investors: Stop the Bleeding, Start the Healing and Get Your Portfolio on the Road to Recovery*. The book holds the distinction of being one of the top five financial books of 2009, according to Canada's Money Sense Magazine. She has also penned a number of financial pieces for a variety of respected publications.

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1:15 PM	TAX UPDATE 2018: WHAT ADVISORS NEED TO KNOW	KEYNOTE

Jamie Golombek, CPA, CA, CFP, CLU, TEP
Managing Director, Tax & Estate Planning, CIBC Financial Planning & Advice

Jamie Golombek is Managing Director, Tax & Estate Planning with CIBC in Toronto. As a member of the CIBC Financial Planning & Advice team, Jamie works closely with advisors from across CIBC to support their clients and deliver integrated financial planning and strong advisory solutions. He joined the firm in 2008 after 12 years with a global investment company, where he was involved in both internal and external consulting on all areas of taxation and estate planning. Jamie has also worked for Deloitte as a tax specialist in the Toronto office, where he specialized in both personal and corporate tax planning.

Jamie is quoted frequently in the national media as an expert on taxation, writes the weekly "*Tax Expert*" column in the National Post, has appeared as a guest on BNN, CTV News, and The National and has been a regular personal finance guest on *The Marilyn Denis Show*.

3:00 PM	PLANNING SOFTWARE: THE VALUE OF ADVICE	PLENARY 6

Dave Faulkner, CLU, CFP
Co-founder & CEO, Razor Logic Systems Inc.

Dave Faulkner entered the insurance industry in 1978. Since then his career has evolved from selling insurance to designing software tools for insurance agents, investment advisors and financial planners. As a software consultant, Dave's clients include insurance companies, MGAs, banks and wealth management firms. He is also a practicing financial planner specializing in estate planning for professionals and small business owners.

Dave is Co-founder and CEO of Razor Logic Systems Inc., an innovative software company and creator of RazorPlan financial planning software.

Upcoming Events

President's Seminar and AGM
May 15, 2018 | Fairmont Waterfront, Vancouver

Spring Update 2018
May 2018 | Brix Studio, Vancouver (or via Webinar)

Fall Update 2018
September 2018 | Brix Studio, Vancouver (or via Webinar)

Estate Planning Conference
October 2018 | Italian Cultural Centre, Vancouver

Year End Seminar
November 22, 2018 | Italian Cultural Centre, Vancouver

*Events schedule is subject to change.

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