



Summit chair Patrick Cziolak (at podium) takes a moment to recognize the efforts of his organizing committee. Left, Barry Trischuk; right, Mehul Gandhi; far right; Jeny Yeung.



A session on ethics wasn't boring: Canada Life speaker Jos Herman engaged advisors in testing their ethics knowledge with gamification using an interactive tool called Kahoot. The large screens showed who was answering questions, and how many they were getting right.



It was a packed room at the Hyatt Regency. The inaugural financial planning summit sold out in 10 days.

Vancouver Chapter Hosts First Financial Planning Summit

A financial planning summit organized by the Greater Vancouver chapter sold out in 10 days, with more than 200 advisors attending.

“Holistic planning has become essential to the well-being of clients’ financial health,” says Patrick Cziolak, the chapter’s professional development chair, and chair of the summit. “As a result, knowledge in the varied areas of financial planning has become more important than ever. This summit was designed to provide a landscape of topics that covered many areas of a comprehensive financial plan. Even if an advisor only specializes in only one area, our intention was to provide valuable information that could help them enrich their clients’ experience in working with a professional advisor.”

Speakers were Jos Herman, wealth and tax planning lead at Canada Life; lawyer Amy Mortimore, who specializes in estate and trust litigation; Brent Joyce, the chief investment strategist for GLC Asset Management Group; and Cindy David, a financial planner

and industry consultant who led a session on retirement planning. Keith Brown, an advisor and industry leader in tax and estate planning, led a session on risk management and financial planning for business owners.

The summit’s keynote speaker was Jamie Golombek, *FORUM* tax columnist and the managing director of tax and estate planning for CIBC. Known for speaking with flair, he made a 2018 tax update for advisors both informative and entertaining.

Although there was no official fun zone, there was gamification built into some of the speaker presentations. In her talk on ethics, speaker Jos Herman used Kahoot, a game-based, interactive learning-and-trivia tool. Advisors logged into a game room on their smartphones and answered ethics questions based on a case study. The main screen showed how many participants answered questions, and how many points each player accumulated. It proved that a session on ethics doesn’t have to be dry.

“It was a fun experience and a good opportunity to brush up on ethics,” Cziolak explains.

In another session about planning software and the value of advice, Dave Faulkner,

an insurance-advisor-turned-software-consultant, raised advisors’ comfort level with robo-advice technology.

“He focused on how much more value a financial advisor can offer than a robo-advisor can,” explains Cziolak. “He didn’t discourage you from using a robo platform; rather, he encouraged using it in conjunction with your practice.”

Living Legends Share Success Stories

What does it take to make it in our industry? Top advisors Veena Daddar and Helene Meyer shared their experiences and insights with **Toronto** chapter members at a “Living Legends” breakfast event on March 8.

“It takes a lot of discipline,” says Daddar. “You can be comfortable in this business, or you can keep striving. It depends on where you want to be.”

Both advisors believe it’s a lot harder starting out as an advisor today. Daddar believes the compliance, ethics, and regulatory issues facing advisors today have “taken the fun out of the business.”