

2018 Business Education Summit - Halifax

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|---|---|--|---|---|--|
| Tues, Oct 30 | 8:00 a.m. - 5:00 p.m. | Taking the Stage Convention Hall C3 | | | |
| | 12:00 p.m. - 5:00 p.m. | Registration - TBD | | | |
| | 7:00 p.m. - 9:00 p.m. | Welcome Reception - Pier 21 | | | |
| Wednesday, October 31 | 6:45 a.m. - 7:45 a.m. | Discover IIROC Breakfast - Room 109 | | | |
| | 6:45 a.m. - 7:45 a.m. | Group Breakfast - Ballroom B1 | | | |
| | 8:00 a.m. - 9:50 a.m. | * General Session - Convention Hall C1 - C2A | | | |
| | 9:50 a.m. - 10:35 a.m. | Speed Meeting/Refreshment Break - Foyer C5 | | | |
| | 10:35 a.m. - 12:15 p.m. | * General Session (continued) - TBD | | | |
| | 12:15 p.m. - 1:15 p.m. | Group Lunch Ballroom B1 | President's Lunch Room 106/107 | | |
| | EXTERNAL CONCURRENT SESSIONS | | | | |
| | Convention Hall C3 | | Convention Hall C4 | B3 | |
| | 1:15 p.m. - 2:45 p.m. | Converting Friends, Family and Social Acquaintances into Clients <i>Sarano Kelley</i> | Building the Tomorrow Business <i>Penny Phillips</i> | Rise to the Top <i>Eszylfie Taylor</i> | |
| | | 1 | 2 | 3 | |
| 2:45 p.m. - 3:30 p.m. | Speed Meeting/Refreshment Break - Foyer C5 | | | | |
| Convention Hall C3 | | Convention Hall C4 | B3 | | |
| 3:30 p.m. - 5:00 p.m. <i>1.5 hours</i> | Converting Friends, Family and Social Acquaintances into Clients <i>Sarano Kelley</i> | Building the Tomorrow Business <i>Penny Phillips</i> | Rise to the Top <i>Eszylfie Taylor</i> | | |
| | 4 | 5 | 6 | | |
| 7:00 p.m. - 10:00 p.m. | Group Event - Convention Hall C1 - C2A | | | | |
| Thursday, November 1 | 7:45 a.m. - 8:45 a.m. | Group Breakfast - Convention Hall C1 - C2A | | | |
| | ED TRACKS | | | | |
| | Convention Hall C3 | | Convention Hall C4 | B3 | Room 109 |
| | 8:30 - 8:45 | Sales Success in Key Segments & Markets Anna Jochelson 29 (60 mins) | Our Competitive Advantage in the HNW Market is in our DNA Claude Paquin, Carl Thibeault & Nicholas Shields 28 (90 mins) | Planning for Owner Managed Businesses in the New Corporate Tax Enviornment Part 1 Aurèle Courcelles & Blair Evans 11 (3 hours) | Talent Acquisition Ideation Workshop: Attracting quality talent within your network Lisa Ritchie & Carl Thibeault Regional Directors ONLY Part 1 33 (180 mins) |
| | 8:45 - 9:00 | | | | |
| | 9:00 - 9:15 | | | | |
| | 9:15 - 9:30 | | | | |
| | 9:30 - 9:45 | BES TALK / Marcello Millar, Barrie York-Simcoe 45 (30 mins) | Event Marketing for HNW Client Acquisition Peter Bent 26 (60 mins) | Planning for Owner Managed Businesses in the New Corporate Tax Enviornment Part 2 Aurèle Courcelles & Blair Evans | Talent Acquisition Ideation Workshop: Attracting quality talent within your network Regional Directors ONLY Part 2 |
| | 9:45 - 10:00 | | | | |
| | 10:00 - 10:15 | | | | |
| | 10:15 - 10:30 | | | | |
| | 10:30 - 10:45 | Network Exchange/Refreshment Break - Foyer C5 | | | |
| | 10:45 - 11:00 | Managed Solutions - Welcome to the New Age! Scott Waugh, Natalie Godbout & Blackrock Asset Management 15 (60 mins) | Private Corporations – Financial Analysis and PFP Jack Courtney & Terry van Dreumel 23 (90 mins) | | |
| | 11:00 - 11:15 | | | | |
| | 11:15 - 11:30 | | | | |
| | 11:30 - 11:45 | | | | |
| | 11:45 - 12:00 | Group Lunch - Convention Hall C1 - C2A | | | |
| | 12:00 - 12:15 | | | | |
| | 12:15 - 12:30 | | | | |
| | 12:30 - 12:45 | | | | |
| | 12:45 - 1:00 | Teaming – which option is right for me? Jody Maw 16 (60 mins) | Planning for U.S. taxpayers living in Canada and selected cross-border issues Mariska Loeppky 19 (90 mins) | | |
| | 1:00 - 1:15 | | | | |
| | 1:15 - 1:30 | | | | |
| | 1:30 - 1:45 | | | | |
| | 1:45 - 2:00 | Network Exchange/Refreshment Break - Foyer C5 | | | |
| | 2:00 - 2:15 | | | | |
| | 2:15 - 2:30 | | | | |
| | 2:30 - 2:45 | | | | |
| | 2:45 - 3:00 | BES TALK / Consultant TBD 46 (30 mins) | RDSPs and Tax/Estate Issues for Persons with Disabilities Sara Kinnear 7 (90 mins) | Client Acquisition Planning -Working Through and Completing our CAP Document Claudia Dostal & Drew Robertson 27 (90 mins) | |
| | 3:00 - 3:15 | | | | |
| | 3:15 - 3:30 | | | | |
| | 3:30 - 3:45 | | | | |
| 3:45 - 4:00 | The Maestro Portfolios Turn Three! Host IG Investments, featuring Les Grober 20 (60 mins) | | | | |
| 4:00 - 4:15 | | | | | |
| 4:15 - 4:30 | | | | | |
| If flights, suggest after 6:30pm | Departures | | | | |