



Living Benefits Symposium

October 11, 2012

9:30 a.m. - 3:30 p.m.

PPI Solutions (BC) Inc. invites you to attend the annual Living Benefits Symposium

Terminal City Club, 837 West Hastings Street, Vancouver

Please note: the Club's dress code is Business Casual, that includes solid coloured denim, provided it is worn with a collared shirt.

6.25 total CE Credits (3.25 Advocis & 3 General)



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OCTOBER 11, 2012 Agenda

- 9:30 Opening remarks by Sean Carey, CFP, President, PPI Solutions (BC) Inc.**
Announcing the 2013 Poet's Cove Contest; the PPI Solutions Toolkit Applet—"Bridging Risk"
- 9:45 An overview of Sun Life's Long Term Care Insurance using the Retirement Protection Strategy—Kitty Estrella, CFP, CLU, Regional Sales Director, Sun Life Financial**
The retirement protection strategy demonstrates how including long term care insurance (LTCI) in their retirement planning could help clients protect their chosen retirement. The weekly income-style benefit would be available to help them cope if a significant health event or progressive medical condition resulted in the need for ongoing care.
- 10:25 BREAK**
- 10:40 The PPI Solutions Toolkit Applet—"Income Replacement"—Sean Carey**
- 10:50 Disability Sales & Marketing Ideas Advancing Your Practice with Living Benefits—Ginny O'Leary, B.Sc.Comm, CHS, EPC, CLU, Director, Living Benefits Sales, Manulife Financial**
When was the last time you spoke to your client about a plan that would pay their expenses, protect their lifestyle and even give them some money back? A session on tried and tested sales ideas for your business clients and some underwriting tips to help you grow your revenue.
- 11:30 Critical Illness Insurance: Key Markets & Sales Ideas—Donna Thorne, CHS, EPC, Senior Business Development Manager, BMO Life Assurance Company**
Need help with positioning Critical Illness protection with your clients? Do not miss this innovative and practical session delivered by Donna Thorne, an expert on this subject.
- 12:10 LUNCH**
- 1:10 The issue of Longevity and how it relates to the Care-Years planning—Patty Randall, Writer, Expert Speaker on the issue of care in Canada**
Patty is an "edu-tainer" - a national speaker on care-years planning, the impacts of care-giving on loved ones, available government programs and services offered in each of our provinces and territories, the gaining trends affecting our current lifestyles and retirement as well as the costs of care for families. She presents the everyday changes we all have to face to accommodate living longer.
- 3:10 Closing remarks by Sean Carey**

RSVP by OCTOBER 5, 2012 with Lorraine Grimes at 778.374.3500 or 1.800.605.1644,
email vreception@ppisolutions.ca



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