

Monthly Platform Events Schedule - December

Meanings of Color

Platform Events
Carriers' Training
Events for Members' Guests
1-on-1 Case Studies

Remarks:

RSVP to the Google calendar of admin@wayfinancial.ca. Events take place in Way Boardroom unless otherwise specified. Strategies and opinions presented by speakers are in their personal capacity and do not reflect the views of the Platform.

		Dec 2	Dec 3	Dec 4	Dec 5	Dec 6	Dec 7
Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1st	9:30am-10am					HLLQP Exam Preparation <i>Jack Cao</i>	
	10am-11am	New Member Training School <i>(10am -1pm)</i>	New Member Training School <i>(10am -1pm)</i>	How to make cross-industry partnerships work for your business and benefits <i>Ace Liew & Jack Cao</i>	New Member Training School <i>(10am -1pm)</i>		
	11am -12:30pm					Understanding for Critical Illness Underwriting <i>EL Monica Zhang</i>	
	2pm					1-on-1 Case Studies <i>EL Monica Zhang (1 - 3 pm)</i>	
		Dec 9	Dec 10	Dec 11	Dec 12	Dec 13	Dec 14
Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2nd	9:30am-10am					HLLQP Exam Preparation <i>Jack Cao</i>	
	10am-11am	New Member Training School <i>(10am -1pm)</i>	New Member Training School <i>(10am -1pm)</i>	Special Pro-D Day for Financial Advisors <i>(10am to 12:30pm Boardroom, 12:30pm-2:00pm at Neptune Restaurant)</i>	New Member Training School <i>(10am -1pm)</i>		Lunch & Learn: Latest in the market – Canada Life's New Par <i>CL Carol Ng</i>
	11am -12:30pm						
	2pm			1-on-1 Case Studies <i>Simon Mok (Boardroom)</i>	1-on-1 Case Studies <i>RBC Mike Jackson (Lounge)</i>	Section 4 [20 Secrets that the Taxman Doesn't Want You to Know] <i>(Starts at 1:45pm)</i>	1-on-1 Case Studies <i>CL Carol Ng (1 - 3 pm)</i>
		Dec 16	Dec 17	Dec 18	Dec 19	Dec 20	Dec 21
3rd	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am -12:30pm			Merits of Disability Insurance, starting with the Advisor's Own Practice <i>Stephen Lai & RBC Lucy Fairbotham</i>		How to make 20% more commissions and enhance efficiency on CII business <i>IA Rishu Bains & Michelle Kwan</i>	

	2pm						
		Dec 23	Dec 24	Dec 25	Dec 26	Dec 27	Dec 28
4th	9:30am-11am		Office Closed at 1:30pm	Christmas Day (Office Closed)	Boxing Day (Office Closed)	HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm					How to use Long Term Care Insurance as part of Estate Planning for clients <i>SL Viola Lam</i>	
	2pm						
	4pm						
		Dec 30	Dec 31				
5th	9:30am-11am		RESP Training <i>Brion Chhachhi (10:30am-12pm Prominence Office)</i>				
	11am - 12:30pm						
	4pm		Office Closed at 1:30pm				