

Monthly Platform Events Schedule - March

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.

		Mar 2	Mar 3	Mar 4	Mar 5	Mar 6	Mar 7
Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1st	9:30am-10am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Way Insiders' News: Creating Easy Business Opportunities with an Exclusive Product Line <i>Sunny Chan</i>		Understanding Updated Underwriting Guidelines For Temporary Residents <i>EQ Monica Zhang</i>	
	2pm			1-on-1 Case Studies <i>RBC Mike Jackson</i>		1-on-1 Case Studies <i>EQ Monica Zhang (1 - 3 pm)</i>	
		Mar 9	Mar 10	Mar 11	Mar 12	Mar 13	Mar 14
Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2nd	9:30am-10am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Case Studies: 15 Corporate Strategies Lawyers & Accountants Want to Know - #7 Property Tax Repayment Using Corporate Earnings <i>COT Carmen Ke</i>		Lunch & Learn: How to quickly close cases with CL's New Par - Wealth Achiever Plus <i>CL Carol Ng & Jeff Nason</i>	
	2pm			1-on-1 Case Studies <i>Simon Mok (Simon's Office)</i>		1-on-1 Case Studies <i>CL Carol Ng (1 - 3 pm)</i>	
		Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21
3rd	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Business Management on The Power of Compounding <i>Stephen Lai</i>		New Business from Manulife Vitality, PAR and Lifecheque <i>ML Chris Chang</i>	
	2pm					1-on-1 Case Studies <i>ML Chris Chang (1 - 3 pm)</i>	

		Mar 23	Mar 24	Mar 25	Mar 26	Mar 27	Mar 28
4th	9:30am-11am			1-on-1 Case Studies <i>Simon Mok</i> (10 - 11am)		HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Role Play 2nd Solution and Closing - 3 RRSP mistakes and 9 solutions (#8 Interest Deduction) <i>Simon Mok</i>		Recent Market Changes: What You Need to Know <i>CL Tajammul Pannun & Chris Lane</i>	
	2pm			1-on-1 Case Studies <i>Simon Mok</i> (Simon's Office)	LECTURE 15 - Company Solutions Lawyer CPA need to know <i>1:45 - 4pm</i>		
		Mar 30	Mar 31				
5th	9:30am-11am		RESP Training <i>Brion Chhachhi</i> (10:30am - 12pm, Prominence Office)				
	11am - 12:30pm						