



**23<sup>rd</sup> Annual National Advisor Conference & Trade Show  
Breakout Sessions  
September 16-18, 2024**

<b>Monday September 16, 2024</b> <i>Only choose one presentation between the 2 breakouts for each time slot</i>		<b>Tuesday September 17, 2024</b> <i>Only choose one presentation between the 2 breakouts for each time slot</i>	
<b>2:15 PM – 3:15 PM</b> <b>Main Meeting Room – Florentine C/D</b>  <b># 1</b> Exploring The Impact Of Living Benefits On Your Client's Financial Security <b>Robert Watson &amp; Perry Wong CPA, CA</b> <i>Sponsored by Combined Insurance</i>	<b>2:15 PM – 3:15 PM</b> <b>Florentine B Room – Behind Main Meeting Room</b>  <b># 2</b> Estate Planning 101 <b>Dale Barrett LLB, Tax Lawyer</b> <i>Sponsored by Barrett Tax Law</i>	<b>2:15 PM – 3:15 PM</b> <b>Main Meeting Room – Florentine C/D</b>  <b># 4</b> Partnering with Other Professionals to Serve the Protection Needs of your Clients <b>Rhona Konnelly, CLU, EPC, CPCA</b> <i>Sponsored by Konnelly Consulting</i>	<b>2:15 PM – 3:15 PM</b> <b>Florentine B Room – Behind Main Meeting Room</b>  <b># 5</b> Executor Success <b>Monica Rehal</b> <i>Sponsored by Canada Protection Plan (a Foresters Financial Company)</i>
<b>3:15 PM – 4:15 PM</b> <b>Main Meeting Room – Florentine C/D</b>  <b># 3</b> 10 Steps to Become A Philanthropic Entrepreneurial Advisor <b>Mark Halpern CFP, TEP, MFA-P</b> <i>Sponsored by WEALTHinsurance.com</i>			
<b>4:15 PM – Enjoy Your Stay in Las Vegas</b>		<b>3:15 PM – 4:15 PM</b> <b>Main Meeting Room – Florentine C/D</b>  <b># 6</b> Hands-On Workshop: Transitioning to a Paperless Office, Automating Compliance, and Building a Modern Digital Client Journey <b>Ahilan (AKIL) Balachandran</b> <b>B.Comm, CFP, CLU, CHS, EPC</b> <i>Sponsored by BlueMind App</i>	
		<b>4:15 PM – Enjoy Your Stay in Las Vegas</b>	

***Did you know that if you register and attend some of the Breakouts, you can EARN up to 4 additional CE credits and increase your financial knowledge with products and ideas that you can immediately use with your prospects and clients.***

***You could also win \$500 USD by attending the optional BREAKOUTS?  
REGISTER NOW TO ATTEND.***

*Agenda and times subject to change*