DAC

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SOAR HIGHER: PLAN FOR YOUR GREATER POTENTIAL

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PROGRAM DIRECTOR

Knowledge Bureau® Excellence in Financial Education

SUNDAY NOVEMBER 6TH
REGISTRATION AND RECEPTION

2:00 – 5:00 PM

LOEWS CORONADO BAY RESORT
4000 Coronado Bay Rd
San Diego, CA 92118
619-424-4000
Constellation Foyer
Pick up name badges and conference materials on the 2nd level foyer. Your DAC Events team will be on hand to welcome you and to make reservations for local activities and tours.

6:00 – 8:00 PM

OPENING RECEPTION – PLAN FOR YOUR GREATER POTENTIAL!

THE TOP GUN RECEPTION - SOAR HIGHER!

Join us on the "flight deck" as we plan to soar higher with an outstanding evening of great food and entertainment at our opening reception. This is a superb opportunity to network with old and new acquaintances, and converse with our speakers and sponsors. An outstanding Southern California cuisine will be served along with a cash bar. Location: Bay Terrace

Dress: Aviator Chic - Business Casual with a Twist – we'll take care of the "twist". This will be an outdoor event and as we are on the Ocean it can be cool; please dress accordingly.

Your Hosts:

Title Sponsor:

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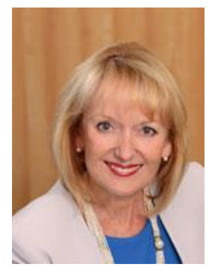
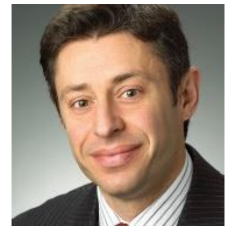
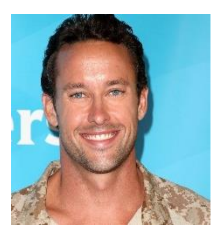
Program Director:

Knowledge Bureau
Excellence in Financial Education

To participate call 1-866-953-4769

We are building the agenda and confirming speakers, sponsors and breaking news now. For the latest Agenda check out the website often! www.knowledgebureau.com

DAY 1 **MONDAY NOVEMBER 7TH** THEME: FORTY THOUSAND FOOT VIEWS		
7:00 - 7:45 AM	**HOT BUFFET BREAKFAST – MISTRAL ROOM**	
7:45 - 8:00 AM **.25 CE Credits**	**WELCOME REMARKS – CONSTELLATION BALLROOM** **David Christianson – Master of Ceremonies**: A best-selling author of *Managing the Bull*, a Fellow of the FPSC who was recognized as one of the **Top 50 Financial Advisors** in Canada, and Independent Financial Advisor Team of the Year, STEP Private Client Awards, David has charmed DAC delegates since 2011 with his wit and humor and tremendous insights into the issues that dominate changes in the professional financial services.	 **DAVID CHRISTIANSON** **Best-selling Author & Award-winning Advisor**
8:00 - 8:45 AM **.75 CE Credits**	**SOAR HIGHER: Top Ten Disruptors in the Tax and Financial Services and How to Manage Them to Your Advantage** Explore your greater potential in bringing new strategic purpose to tax efficient retirement, succession and estate planning in this era of great change, by embracing the very disruptors that bring enormous opportunity your way. Canada's most respected tax and family wealth educator, Evelyn Jacks, author of 52 books and Founder & President of Knowledge Bureau, will share details of the 10 most important new tactics to ward off the most substantive disruptors to family wealth creation and retention, and discuss three skilled manoeuvers to manage away emerging new risk factors on the horizon.	 **EVELYN JACKS, MFA,** **DFA-Tax Services Specialist** **President & Program Director** Knowledge Bureau Excellence in Financial Education
8:45 - 9:45AM **1.0 CE Credits**	**THINK BOLDLY: How to Provide Really Good Advice in Today's Global Economy** How will future trends in tax and economic affairs in Canada and around the world impact the work financial advisors do? As economic realities continue to force politicians to respond to new circumstances, what insights should financial advisors focus on to maximize after-tax returns for clients? The answer begins with a better understanding of both economic change and shifts in economic policy from one of Canada's most respected public policy experts and recent recipient of the Order of Canada, who has advised governments throughout the world. He is the President's Fellow of the School of Public Policy at the University of Calgary, Chair and Vice-President of the Social Sciences and Humanities Research Council of Canada and the National Policy Advisor for the accounting firm EY.	 **DR. JACK MINTZ, O.C.** **SPONSORED BY** Knowledge Bureau Excellence in Financial Education

9:45-10:30 AM **.75 CE Credits**	**CORPORATE INVESTORS:** **How to Build On Large, Untapped Potential** In today's tax and economic climate, multi-generational planning faces new risks. One large untapped market that the typical investment advisor is missing is the management of corporate investments. Tap into new opportunities by uncovering the latent potential in these resources to maximize your skills in investment, retirement and estate planning. **BROUGHT TO YOU BY TITLE SPONSOR** Manulife	 **JOHN NATALE,** **AVP Tax & Retirement Services at Manulife Financial**
10:30 – 11:00 AM **.50 CE Credits**	**MIMOSA BREAK** **PARTICIPATE IN THE DIGITAL SURVEY FOR GREAT PRIZES: Test Your Skilled Financial Manoeuvers**	HOME TRUST **MIMOSA BREAK SPONSOR**
11:00 – 11:45 AM **.75 CE Credits**	**THE FIGHT IS ON: Why Governments' Plans for Canadian Retirements Require Action and How We Can Win** With the cost of public sector pension plans becoming increasingly unsustainable, unions have convinced many governments that a hike to CPP is the answer to retirement security. Dan Kelly, President, Canadian Federation of Independent Business, will have lot to say about that and what advisors need to think about with their clients, at the Distinguished Advisor Conference. We now know some of the expensive details. New Federal Finance Minister Bill Morneau has given his personal commitment to reach a deal to raise CPP premiums in 2016 and introduce legislation. Are these the best options for Canadians? How will this affect private savings for retirement and employment in the business sector? What will the fallout be for the financial services industry as Canadians ante up more income into mandatory government plans? Can we still push back or is it too late?	 **DAN KELLY** **President, CFIB** **SPONSORED BY** Knowledge Bureau Excellence in Financial Education
11:45 – 12:30 PM **.75 CE Credits**	**ALL IN ALL THE TIME: Leadership Lessons for Elite Teams** Brent Gleeson is a combat veteran with multiple tours to Iraq and Africa. He started his career in finance; then, took a detour to join the Navy SEALs. Find out what it takes to develop a culture of "Extreme Ownership" and do what the elite, high performance teams do, from an acclaimed speaker, writer on Inc.com and Forbes.com, and successful entrepreneur, co-founder of a digital marketing agency. Brent will challenge you to think about your high performance team and whether you have the right stuff to motivate, inspire and educate them to soar higher towards a new, dynamic future vision in your business.	 **BRENT GLEESON** **NAVY SEAL VETERAN** **SPONSORED BY** Knowledge Bureau Excellence in Financial Education

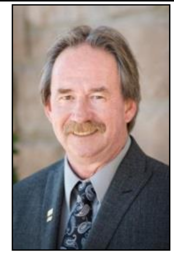
12:30 – 2:30 PM .75 CE Credits	**FOR MFA/DFA-SPECIALIST DESIGNATION GRADUATES AND UNDERGRADUATES: A BY-INVITATION-ONLY EVENT!** **THE GRADUATE LUNCH – MISTRAL ROOM** Join President Evelyn Jacks and special guests for this “by invitation only” luncheon honoring the achievement of MFA™ and DFA-Tax and Bookkeeping Specialist Designations™. Both grads and under-grads of these prestigious designation programs will be invited to be in attendance to applaud the achievements of their peers, share stories of their work and hear what’s coming up for them at Knowledge Bureau.	  **SPONSORED BY** PORTFOLIO Strategies
	FREE AFTERNOON: **NETWORK AND MORE IN SAN DIEGO!** 	
6:00 – 9:00 PM	**NETWORKING DINNER – A NIGHT OUT IN SAN DIEGO!** **Spend a Perfect Evening on the Bay** Join your colleagues for a great night out in San Diego. As in other years, we will work with local restaurants to help you make the most of your time at DAC, and provide you with networking opportunities with your peers. More information along with registration and payment will be available as we get closer to the conference.	

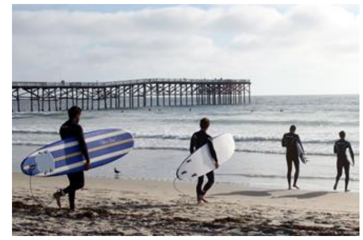
DAY 2

TUESDAY NOVEMBER 8TH

THEME: DELIVERING OUTSTANDING VALUE PROPOSITIONS

7:00 – 7:45 AM	**HOT BUFFET BREAKFAST – MISTRAL ROOM**	
7:45 – 7:50 AM **.25 CE Credits**	**HIGHLIGHTS- AUDIENCE TAKE AWAYS – CONSTELLATION BALLROOM**	**Master of Ceremonies**
7:50 – 8:30 AM **.75 CE Credits**	**THE TOP GUN PRACTICE** - Embracing New Multi-Asset Paradigms Cecil Baldry-White, CEO of Alitis Investment Counsel, believes there are 6 major challenges that Wealth Advisors face in attaining higher returns and longer term performance for their clients in today's difficult investment environment. In this session he will discuss several alternatives to meet these challenges head on and discusses a new multi-asset paradigm that offers a huge opportunity to those who are willing to embrace the necessary changes to get the returns their clients need.	 **CECIL BALDRY-WHITE, CEO** ALITIS INVESTMENT COUNSEL **SILVER SPONSOR**
8:30 – 9:15 AM **.75 CE Credits**	**GLOBAL BEST PRACTICES IN RISK PROFILING:** **Closing the Substantive Gaps in Regulatory Guidance** Are you providing an evidence-based and unbiased determination of your clients' risk profile? Unsure? You're not alone. According to IIROC (2014), risk tolerance was the number one category of regulatory violations that moved to prosecution; yet, regulators offer little guidance in the process. The vast majority of risk profiling questionnaires are poorly worded and scored with no ability to manage risk-adverse clients. Find out how to understand your clients better and maximize your potential to shine in this complex, yet vital area of regulatory compliance.	 **SHAWN BRAYMAN, CEO, PLANPLUS, Inc.**
9:15 TO 10:00 AM **.75 CE Credits**	**THE NEW FACTORY ADVISOR: How to Create a Value Hub to Succeed in a Disrupted Marketplace** Do you want to learn a whole new way of thinking about your business so you can be at least 100 times more excited about your future? Then you won't want to miss this must-hear session with Bill Bishop, President of Bishop Communications, that contemplates: how big is your potential and then shows you how to soar higher toward it!	 **BILL BISHOP, PRESIDENT** BISHOP communications Inc **SILVER SPONSOR**

10:00 – 10:30 AM **.5 CE Credits**	**MIMOSA BREAK** **PARTICIPATE IN THE DIGITAL SURVEY FOR GREAT PRIZES:** **Test Your Skilled Financial Manoeuvers**	HOME TRUST **MIMOSA BREAK SPONSOR**
10:30 – 11:15 AM **.75 CE Credits**	**IT'S ABOUT WHAT YOU KEEP:** **Get Better Results by 'Layering' Retirement Income** Maximize your potential to shine in the financial services with an integrated retirement and estate planning solution. **Alan Rowell**, MFA, DFA-Tax Services Specialist and President of The Accounting Place will show you how to control two things: when and how retirement income is taxed. He will share new manoeuvers that will impact your clients' wealth for multiple generations. Join us for this invaluable case study, which will provide timely information to revitalize and embellish on your value proposition in the wake of new fee disclosure rules under CRM2.	 **ALAN ROWELL, MFA,** **DFA-TAX SERVICES SPECIALIST** **PRESIDENT** THE ACCOUNTING PLACE® 1 866 938 1010 Talk to us **SILVER SPONSOR**
11:15 – 12:00 PM **.75 CE Credits**	**FRONT & CENTRE: Navigating Change & Delivering Exceptional Client Experiences** The investment industry is in a period of unprecedented change. New regulations, new competitors, new products, new pricing, new technologies, and new business models present great challenges, but also great opportunities for Canadian advisors. Against this backdrop, telling YOUR story has never been more important. Duane Green will discuss how you can define your value proposition and deliver an exceptional experience that your clients will gladly pay for…and talk about! **PRESENTATION:** **DAC INAUGURAL CLIENT INNOVATION SCHOLARSHIP AWARD**	 **DUANE W. GREEN** **MANAGING DIRECTOR, CANADA** FRANKLIN TEMPLETON INVESTMENTS **DIAMOND SPONSOR**
12:00 – 12:45 PM **.75 CE Credits**	**NEW CLIENT ACQUISITION: BRING IT ON!** **Learn to Think Bigger, Aim Higher & Have More Fun** New client acquisition continues to be one of the most challenging aspects of building a professional insurance advisory practice. Yet, never before have more Canadians been interested in the products and services the industry can provide. So why are the number of Canadians who become clients shrinking? This session will explore how and why reversing this trend is anchored in creating alignment between consumer expectations on engagement and how the industry is prepared to engage them. The research is very clear. . .and you may be very surprised!	 **TODD HYNES** **VICE PRESIDENT** ivari™ **SILVER SPONSOR**

	**FREE AFTERNOON:** **EXTREME NETWORKING ON CORONADO ISLAND** **BUILD YOUR GREATER FUN POTENTIAL!** Spend the afternoon networking with your peers, or rent a kayak, paddle board, jet ski or sailboat at the resort and spend the afternoon on the water or quite simply by the resort pool or relaxing at the spa. ***Then be sure to back on time for DAC's signature event. . .***	
7:00 – 10:00 PM	**THE DAC GALA** **THEME - IT'S A JUNGLE OUT THERE!** **CELEBRATE THE POTENTIAL** **OF A NEW FINANCIAL ECO-SYSTEM** **This jungle-themed gala is designed to help you get to know your "jungle-mates" better as we plan for a changing new world order in the jungle. It's full of interesting and potentially dangerous disruptors and the best way to prepare for your journey is to dress for the theme: a little jungle elegance, or go ape if you like! Location: Poolside**  Be sure your corporate name is on the Gala Sponsor List. Call us today for 1-866-953-4769 for more information.	

DAY 3
WEDNESDAY NOVEMBER 9TH
THEME: A NEW WORLD OF COMPLIANCE

7:00 – 7:45 AM	**HOT BUFFET BREAKFAST – MISTRAL ROOM**	
7:45 – 8:30 AM **.75 CE Credits**	**AFTER THE ELECTION: UNDERSTANDING THE NEW ORDER** **CONSTELLATION BALLROOM** It's been a most controversial run-off to attain the most powerful leadership position on earth. Interpret the results with one of Canada's most prolific national political commentators Jeffrey Simpson, and find out how the new world order may affect your work with your clients.	 **JEFFREY SIMPSON** **Global Affairs Columnist** **Globe and Mail** SPONSOR: Knowledge Bureau Excellence in Financial Education
8: 30 – 9:15 AM **.75 CE Credits**	**WHEN RISK TOLERANCE IS BROKEN:** **Your Role in Fixing Bad Financial Behaviors** If we really want to help people reach their financial goals, and avoid "bad behavior" because of volatility in the markets, we need to have a broader and more powerful set of tools available than just avoiding volatility. Morningstar's Head of Behavioural Science, Steve Wendel will explain how you can shore up your toolkit to fix what's wrong with risk tolerance and gain insights on how to do it.	 **STEVE WENDEL** SPONSORED BY MORNINGSTAR
9:15 –10:00 AM **.75 CE Credits**	**MILLENNIAL 'HERDS':** **On Becoming Scalable with Insights from Future Top Guns** New regulation, new products, new processes and new players in an environment where 'industry disruption' is a common term. That's the world future top guns are mentoring into and these practices require new vision and strategies in order to be scalable and build capacity for the "millennial herds" that will require expert financial advice five to ten years from now. Do the next Top Guns have what it takes to build their client base and their businesses? Moderator **Barbara Foy-Pilchner**, Vice President, National Accounts, Manulife Investments, is joined by two Top Gun Advisors Lindsay Sawyer Fay and Darren Ryan – this year's recipients of the ***Distinguished Young Advisors Award*** – who will challenge DAC delegates to think deeply about the Financial Advisory Services of the Future.	 **BARBARA FOY-PILCHNER**  **DARREN RYAN**

		 **LINDSAY SAWYER FAY** **Sponsored by:** Manulife **And** Knowledge Bureau Excellence in Financial Education
10:00 – 10:30 AM **.5 CE Credits**	**DELIVERY AND EXECUTION: CHARTING THE JOURNEY TO GOLD** It took precision, practice, determination and drive. The Canadian Women's National Hockey team made the gold in a spectacular fashion in the last winter Olympics. Meet one of those Olympians: 4-time gold medalist, **Caroline Ouellette**, and learn the secrets to stealing the show and beat formidable competitors.	 **CAROLINE OUELLETTE** SPONSOR KNOWLEDGE BUREAU
10:30 – 11:00 AM **.50 CE Credits**	**MIMOSA BREAK** **PARTICIPATE IN THE DIGITAL SURVEY FOR GREAT PRIZES:** **Your Final Chance to Test Your Skilled Financial Manoeuvers**	HOME TRUST **MIMOSA BREAK SPONSOR**
11:00 – 11:45 AM **.75 CE Credits**	**MAXIMIZE YOUR POTENTIAL:** **How to Leverage the Science of Peak Performance** Burning the candle at both ends or is your candle too close to the fire all the time? Craig Dowden (Ph.D.), last year's top rated DAC speaker, will show you how to avoid this reality and share strategies to help you maximize your success. In this dynamic and evidence-informed session, Craig will showcase how individuals who are able to practice their core values and create a purpose are buffered against the negative effects of stress and burnout. Learn how to reverse negative trends and work to your strengths to achieve your potential.	 **Craig Dowden, (Ph.D.)** **SPONSOR:** Knowledge Bureau Excellence in Financial Education
11:45 – 12:30 PM **.75 CE Credits**	**RAISING THE PROFESSIONAL BAR ON STANDARDS OF CARE** The financial capabilities required of clients in a dramatically changing world is a multi-dimensional concept that requires astute multi-dimensional advice. Despite the fact that Canadian regulators are considering implementing changes that may negatively impact how you do business with your clients, the opportunity is great to help multiple generations with their financial capabilities and purposeful wealth creation because of their close relationship with top professional advisors. Greg will inspire you to think about your professionalism as a leading value proposition in your relationship with your clients.	 **GREG POLLOCK** **President and CEO** **ADVOCIS**

12:30 -12:45 PM **TOTAL CE CREDITS:** **15.50 CE Credits**	**CONFERENCE CLOSE: TAKING IT TO THE STREET** First Attendees: Announcing the Winner of the Free Attendance Draw - DAC 2017 and closing comments from the Programming Director and President of Knowledge Bureau, Evelyn Jacks.	 **EVELYN JACKS** **Founder and President** **Knowledge Bureau**

