



2024 ACUITY CONFERENCE

For Distinguished Advisors
MONTREAL, QC | NOV. 10-12

Safe Havens: Secure Financial Futures & Wealth Potential

Program Guide



Educational
Sessions



Activities



Meals &
Events



Saturday, Nov. 9: Pre-Conference Social

Thank You to Our 2024 Sponsors



10:30am - 1:30 pm *Montreal Foodie Tours*

Sample the best of this beautiful cosmopolitan city!



5:00 - 10:30pm *Montreal at Night!*

Gatherings at selected fine dining sites in Montreal. Arrange group reservations.

Sunday, Nov. 10: Pre-Conference Activities



11:30 - 1:30pm St. James Club

Safe Havens: "Off the Record" RWM™ Brunch
Registration required.



5:30 - 6:30pm *Midway Room, St. James Club*
Conference Registration



6:00 - 6:30pm *Saint Denis Room*

Designated Specialist Wine & Cheese
Meet and Greet hosted by Dean Cockell



6:30 - 9:30pm *Saint Denis Room*

**Opening Reception &
Knowledge Bureau Awards Dinner**
Keynotes by Evelyn Jacks & Tony Mahabir

ACUITY SITE & ONLINE AGENDA



Visit the comprehensive
online agenda for speaker,
sponsor and session details.

Complete Session & Event
Evaluations for CE Credit!

TITLE



PLATINUM



GOLD



SILVER



BRONZE



MEDIA



Program Director:



World-Class Financial Education



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Monday, Nov. 11: Safe Havens & Financial Freedom



7:00 - 8:00am Steven Furtado
Breakfast Buffet & Welcome to Acuity 2024
from your MC.



8:00 - 8:45am Evelyn Jacks
Regenerative Wealth Management:
To Reach Safe Havens, Change the Norms



8:45 - 9:30am Douglas V. Nelson
Asset Management:
Managing Retirement Fear Factors



9:30 - 10:30am David Wahl
Investing: Navigating Volatility: A
Crossroads of Opportunity & Uncertainty



10:30 - 11:00am
Mimosa Break hosted by Christina Fazio
& Remembrance Day Moment of Silence



11:05 - 11:45am Panel Discussion
Vision & Focus: Regaining Financial Control
Moderated by: Christine Logan
Panelists: Joanne Thomas & Mark Taucar



11:45 - 12:30pm Dan Kelly
Compliance & Regulation:
Beating Public Policy Barriers: Growing
Businesses from Small to Medium-Sized



12:30 - 1:45pm Kristin Ramlal & Evan Connell
Lunch & Learn: Innovative Solutions to
Maximize Donor's Impact



1:45 - 2:30pm Brian Mennis
Average to Awesome:
Keys to Building Scalable Practices



2:30 - 3:15pm Dr. Andreea Vanacker
Behavioural Finance: The Joy Factor
Unlock the Secrets to Thriving



3:15 - 3:30pm Steven Furtado
The Wrap-Up with Your MC



6:30 - 10:30pm - The Rialto Theatre
The Acuity Gala: Cocktails, Dinner,
Entertainment & Dancing!
Dress in your chosen vintage style!

Tuesday, Nov. 12: Maximize Wealth Potential



7:00 - 8:00am Mandeep Duggal
Breakfast Buffet & Motivational Session
Wake Up Your Latent Potential



8:00 - 8:45am Marc-Olivier Brouillette
Practice Management: AI and ROI



8:45 - 9:30am Larry Frostiak
Post June 25 Capital Gains Planning
for Private Business Owners



9:30 - 10:15am Paula Lester
Wealth Preservation:
Estate Planning Through Uncertainty



10:15 - 10:45am
Mimosa & Brunch Break
Hosted by Christina Fazio



10:45 - 11:30am Michael Van Lierop
Practice Management: The Freedom
Dividend: Separating Advice from
Investments



11:30 - 12:15pm FDFS™ Panel
Practice Management: Priorities for
Building Your Multi-Disciplinary Firm
Panelists: Jim Ruta, Steven Furtado,
Carol Willes, Martin Luc Derome



12:15 - 1:15pm Evelyn Jacks
The Knowledge Wrap Closing Lunch
& Acuity 2025 unveiled!

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6:30 - Cocktails
7:00 - Dinner & Show
8:30 - Desert & Swing Dancing
8:45 - Dancing with the Stars Competition
9:00 - Enjoy some music and dancing

