



World-Class Financial Education

## INTRODUCING THE VANTAGE BREAKFAST SERIES: A NEW PROFESSIONAL DEVELOPMENT OPPORTUNITY

Join us on Thursday, May 9, 2019 from 7:30-9:00 a.m. for the inaugural event in the Vantage Breakfast Series taking place in Toronto, Ontario. Hear four outstanding speakers and earn CE Credits, too.

***The Vantage Breakfast Series*** – **Who is it for?** Leading wealth management firms, manufacturers, distributors and top advisors in the financial services who specialize in providing holistic wealth advisory services. Those who have concerns about distinct changes in consumer needs and emerging regulation, should also attend.

***The Vantage Breakfast Series*** is designed to foster the development of a community of leadership with the mutual goal of working towards the continued advancement of wealth management services. You will hear new perspectives, learn new tax strategies and engage in a new business network.

### **Benefits: Why advisors and their firms should attend:**

- Hear from four outstanding speakers who are thought-provoking and insightful on key industry trends
- Leave with at least three key strategies for growing your advisory business in a conflict-free and holistic manner
- Network with innovative, entrepreneurial and like-minded professionals whose primary objective is to provide top notch services against the backdrop of rapid and dramatic change.
- Earn 2 CE Credits – tuition fees are tax deductible
- Receive a complimentary copy of *“Defusing the Family Business Time Bomb”* by Jenifer Bartman and Evelyn Jacks.

### **Why are IIAC and Knowledge Bureau proud to partner in introducing this series?**

- **To improve the role of the advisor through education.** To provide perspective, deeper knowledge and a strategic advantage to thought leaders and their teams in the wealth advisory services in order to address conflict of interest concerns in the wealth advisory business. The Australian Royal Commission into misconduct in the banking, superannuation and financial services industry, found that *“prevention of poor advice begins with education and training. . . those who know why steps are prescribed are more likely to follow them than those who know only that the relevant manual says, ‘do it.’”*
- **To proactively address the important trends** that affect clients in the foreseeable future.

Major firms, media and top advisors have already confirmed attendance. . .you should be there too!

## **The Speakers**

### **Ian Russell, President & Chief Executive Officer, IIAC**

Ian Russell is President and CEO of the Investment Industry Association of Canada (IIAC), a position he has held since its inauguration 13 years ago. He is a frequent commentator in the media, a regular columnist in industry publications, and a sought-after presenter and speaker on industry issues and developments.

Ian has an Honours degree in Economics and Business from the University of Western Ontario, and a postgraduate degree (MSc Economics) from the London School of Economics and Political Science. He has completed the Partners, Directors and Seniors Officers Qualifying Examination, and is a Fellow of the Canadian Securities Institute.

**Ian will open the event pointing advisors in the direction of four key trends:**

- a. **Demographic patterns among the investing public are changing dramatically.**
- b. **Technology is advancing at a rapid rate.**
- c. **Clients are living longer.**
- d. **Government and regulators have intervened more aggressively in the wealth management business than ever before.**

### **Richard Rousseau, Executive Vice-President - Head of Wealth Management, Private Client Group, Raymond James Ltd.**

Richard Rousseau is Executive Vice-President - Head of Wealth Management in the Private Client Group of Raymond James Ltd, one of North America's leading, independent full-service investment dealers across Canada and the United States.

Richard is an active supporter of various industry associations, including serving as a member of the IIAC Board from 2010-2012, and the National Advisory Committee Chair of the predecessor association, the Investment Dealers Association (IDA), from 2000 to 2002. He is also an avid volunteer with several charitable organizations, including serving as the President of National Bank Financial's 2009 and 2010 United Way (Centraide) Campaigns. He also served as a Board Member for Free the Children for five years.

**Richard will provide a "State of the Union" address** – a view from the corner office which offers insights on trends, opportunities and challenges facing wealth advisory firms today and how leadership teams are planning to address an environment that continues to evolve, while taking care of their clients and developing their teams. *Learn the importance of culture and partnership in executing the process of wealth management.*

**[Dr. Dean Smith, PhD, CFP, TEP, CPA, CA, President, Cadesky U.S. Tax Ltd.](#)**

Dr. Dean Smith has been practicing taxation since 1989 and is a frequent speaker at conferences and seminars. President of the U.S. Tax division of Cadesky Tax, Dr. Dean Smith specializes in cross-border taxation and finance. He holds a PhD in Financial Accounting from the University of Waterloo, an Honours Bachelor of Commerce, and is a Chartered Accountant in both Ontario and Manitoba, a Certified Public Accountant in Illinois, a Certified Financial Planner, and has completed the CICA – In-Depth Tax course.

**Dr. Smith will ask the audience some compelling questions:**

- **How well do you really know your clients – from a cross-border point of view?**
  - Have they thought about moving outside of Canada?
  - Have any of their children moved to the U.S. (or any other country) to attend university? Did you know?
  - If the children stay in the new country – what happens to any estate or succession plans that are in place?
  - Is there a family trust?
  - Are they planning on expanding their business outside of Canada?
    - If so, are they working with foreign advisors?
- ***Are you their trusted advisor?***

**[Evelyn Jacks, President, Knowledge Bureau](#)**

Evelyn is the President of Knowledge Bureau, Canada's most respected educator in tax and financial literacy, and one of Canada's most prolific financial authors. She has penned over 50 books for consumers on tax and wealth management, many of them best-sellers. She has twice been named one of the Top 25 Women of Influence in Canada.

Evelyn has been influential in advising and commenting on tax and financial literacy policies. She was appointed by former Finance Minister Jim Flaherty to the Federal Task Force on Financial Literacy, and by the former Premier of Manitoba, Gary Filmon, to the Lower Tax Commission, to advise on the direction of the provincial tax regime. She also co-founded the Manitoba Financial Literacy Forum in partnership with the Manitoba Securities Commission, dedicated to increasing financial literacy in that province.

**Evelyn will tackle the topic of Tax Disruption.** Trends show that up to 45% of Canada's workforce will be "on demand" or "freelancing" by 2020. At the same time Boomers are planning their exit but before them are some of the greatest financial challenges of a lifetime – from business succession to wealth erosion from high taxation. The role of a "financial quarterback," managing the broader financial affairs of your customer is a concept that's here to stay. And that most trusted advisor needs to bring deep and specialized knowledge to the table. ***Find out how the latest projections and trends impact the delivery of tax-efficient wealth management services for your clients.***

**Event wrap-up by 9:00.**

For more information on the topics and to view the agenda, please visit the [event page](#), and register by **May 8, 2019** to reserve your spot.

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