



Incorporated Business Owner Day - AGENDA

Date: Tues, Oct 16th 2018 Time: 9:45 am – 3:00 pm
Location: Kelowna Golf & Country Club



9:45 – 10:30 Jeny Yeung (Director of Sales) – Shared Ownership Critical Illness Insurance - a must for Incorporated owners.



10:30 – 11:15 Brett Henderson (Director of Sales) – Immediate Financing Arrangements are more attractive then ever given the tax changes!



11:15 – 12:00 Marvin Toy (Tax & Estate Planning Consultant) – Tax changes to passive income. Now what? Also Family Trusts are not dead!

12:00 – 12:30 LUNCH



12:30 – 1:15 Carla Zanotto (Living Benefits Specialist) – Executive Disability Insurance the nuts and bolts of selling large DI policies.



1:15 – 2:00 Rishu Bains (Director of Sales) – Expense protection for business owners – CI or DI or a little bit of both!



2:00 – 2:45 Gary Wardrop – Top 10 insurance mistakes incorporated business owners make

Approximately 5 CE credits available.

Space is Limited so please RSVP by Oct 10th to Kayla at 250.762.2421 / "info@wealthlinkfinancial.ca"

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