

Monthly Platform Events Schedule - July

Meanings of Color

Platform Events
Carriers' Training
Events for Members' Guests
1-on-1 Case Studies

Remarks:

RSVP to the Google calendar of admin@wayfinancial.ca. All events take place virtually unless otherwise specified.
Strategies and opinions presented by speakers are in their personal capacity and do not reflect the views of the Platform.

		Monday	Tuesday	Jul 1 Wednesday	Jul 2 Thursday	Jul 3 Friday	Jul 4 Saturday
Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1st	9:30am-10am			Canada Day (Office Closed)		HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm					Business Insurance Series Session 1: Portfolio Enhancement Tool <i>EQ Monica Zhang & Chris Thompson</i>	12 Tactics Which Your Executor Should Learn & 11 to 13 Company Solutions Lawyer and CPA Need to Know <i>1:55 - 4pm</i>
	2pm					1-on-1 Case Studies <i>EQ Monica Zhang (1 - 3 pm)</i>	
		Jul 6	Jul 7	Jul 8	Jul 9	Jul 10	
Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2nd	9:30am-10am			IA EVO Extranet, Business Tracker & E-delivery Process <i>IA Katrina Apodaca (10 - 11 am)</i>		HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Real Life Case Studies: How do I Start Conversation with Client on Corporate CI Share Ownership <i>COT Carmen Ke</i>		Setting Up for Success in the Mid-market with Canada Life CI <i>CL Carol Ng</i>	
	2pm			1-on-1 Case Studies <i>Simon Mok</i>		1-on-1 Case Studies <i>CL Carol Ng (1 - 3 pm)</i>	
		Jul 13	Jul 14	Jul 15	Jul 16	Jul 17	Jul 18
3rd	9:30am-11am				11 Ways of Property Tax Coding & 3 RRSP Mistakes 9 Solutions <i>Mandarin session (10:55am - 1pm)</i>	HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Business Management on Build Your Wealth with ACP <i>Stephen Lai & B2B Danya Wang</i>		How Manulife Par Competes in Today's Market <i>ML Chris Chang</i>	

	2pm				2 to 3 Tactics Which Your Executor Should Learn & 9 to 10 Company Solutions Lawyer and CPA Need to Know <i>Cantonese session (1:55 - 4pm)</i>	1-on-1 Case Studies <i>ML Chris Chang (1 - 3 pm)</i>	
		Jul 20	Jul 21	Jul 22	Jul 23	Jul 24	Jul 25
4th	9:30am-11am			1-on-1 Case Studies <i>Simon Mok</i>		HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Role Play on Door Opening of Technology "Precision" Proposal to Transfer RRSP and TFSA from Other Parties. Much Easier to Provide Needs <i>Simon Mok</i>		Practice Management: What Does a Fee-Based Business Model Look Like? <i>CL Richard Chen</i>	
	2pm			1-on-1 Case Studies <i>Simon Mok</i>	1-on-1 Case Studies <i>CL Jason Yang</i>		
		Jul 27	Jul 28	Jul 29	Jul 30	Jul 31	
5th	9:30am-11am		RESP Training <i>Brion Chhachhi (10:30am - 12pm, Prominence Office)</i>			HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm					IA Par for Legacy Planning and Business Owners <i>IA Rishu Bains</i>	
	2pm						