Business Owners & Professionals Sessions

Date		Topic	Speaker(s)
May	2010	The Incorporated Business Owner & Professional, Tax, Sale&Estate Planning Issues	Sean Rheubottom
September	2010	Taxation & Wealth Planning Issues of Investment Holding Corporations	Sean Rheubottom
October	2010	Using Insurance as a business tool	Brad Charlton
December	2010	Buy/Sell Agreements & Opportunities for Funding	Sean Rheubottom & Brad Charlton
February	2011	The ins and outs of Incorporating, IPPs and RCAs	George Wilmot & Simon Bedard
April	2011	Will planning issues for Business Owners	Sean Rheubottom
June	2011	I am Successful, Now what? Bulletproofing your Success with Insurance	Brad Charlton
September	2011	Maximizing use of the Small Business Deduction	Sean Rheubottom
November	2011	Tech Wreck, Credit Crunch, and Beyond - 10 years of Review	James Sturdy
January	2012	Corporate estate bond	Brad Charlton
March	2012	Issues for the Mature Business Structure	Sean Rheubottom
June	2012	Business Communications	James Sturdy
September	2012	3 ways to increase your legacy	Brad Charlton
November	2012	Year end tax tips	Cedric Paquin
January	2013	Estate planning as a Tool (Critical Illness for Business Owners)	Brad Charlton
March	2013	Kolbe - understanding you and your employees	James Sturdy
May	2013	Retirement Income Planning	Cedric Paquin
September	2013	Capital Markets review and charitable gifting	Cheidu Odiatu
November	2013	Buy Sell agreements using life insurance	Brad Charlton & Cedric Paquin
January	2014	Market Update - Is this Bull Getting Old? / Corporate Class	James Sturdy & Cedric Paquin
March	2014	Now that I Sold my business, How do I protect my cash?	Cedric Paquin & Brad Charlton
May	2014	Creating your own "Self Directed Pension Plan with Personal or Corporate Assets	Brad Charlton
September	2014	Indexing vs Wealth Management & Corporate Class Case Studies	James Sturdy & Cedric Paquin
November	2014	Market Update, ABC's of RDSPs and Alternative Cash Flow Options	Cheidu Odiatu
January	2015	Travel Insurance	Brad Charlton
March	2015	3 Practice Management Tool for 2015	James Sturdy
May	2015	"Not Your Father's Insurance Policy"	Brad Charlton
September	2015	Writing the Tax Man out of your Estate Plan	Thomas Holmes
November	2015	Let's Talk Safe Money - Insurance as an Asset Class	Brad Charlton

January	2016	Leadership: A Process Not a Person	James Sturday
March	2016	Significant Changes are coming to risk based solutions	Brad Charlton
May	2016	Planning your Business Succession	Thomas Holmes
September	2016	Impact of 2017 Tax Changes to Estate Planning Strategies	Brad Charlton
November	2016	Owner Renumeration Planning	Thomas Holmes
January	2017	Are you covered? Do you have the right commercial insurance	Stephano Amato
March	2017	Cottage Succession Planning	Thomas Holmes
May	2017	The Undiscovered Country of Safe Money Strategies	Brad Charlton
September	2017	Quarterly Investment Review - What we do and how we are positioned	James Sturdy
November	2017	Private Corporation Tax Proposals - Fact vs Fiction	Seth Nerman
January	2018	The Whole Story and Whole Life	Brad Charlton