



14th Annual National Conference - 2016
WALT DISNEY WORLD SWAN AND DOLPHIN RESORT
Orlando, Florida - May 18th - 21st



Featuring...



Darrin Rose



Jan F. Kallmorgen



David Frum

EDUCATION STREAMS FOCUSING ON:

- o Risk Management and Estate Planning
- o Wealth Accumulation and Income Tax Planning
- o Retirement and Life Style Planning *presented by the CIFP Retirement Institute*

PLUS

*** ADVANCED FINANCIAL STREAM:**

Featuring four higher level lectures with original supplemental study materials offering the potential for additional CE credits.

Topics include:

- o **Income Tax Planning: Not as Taxing as You May Think**
Carolyn M. Fallis, MTax, CPA, CA, CFP®, Fellow of FPSC
- o **Human Nature and Investment Decisions**
Brad Bishop, MBA, CFP®
- o **Alternative Trading and Income Strategies**
Patrick O'Meara, CFP®, CMA, MBA
- o **Why Monetary Policy Has Become Impotent – 3 Possible Cures**
Knut Larsen, cand.oecon., CFP®, FCSI

For more information visit:
www.CIFPs.ca/Conference

CONFERENCE HIGHLIGHTS:

- o Two-and-a-half days of information packed sessions
- o Top technical speakers on advanced financial topics, sales and practice ideas
- o Claim up to 25 FPSC verifiable CE credits¹, 20 Insurance credits or 10 IIROC credits
- o Tradeshow Exhibition (two-and-a-half days)
- o Outstanding special events & networking opportunities
- o Great Companion Program that includes all meals and conference events – *Bring the kids and make the magic of Walt Disney World® a family event!*

Join us at the premier financial planning gathering of major Canadian financial services organizations, planners, technical and educational experts

Register by April 15th for the best prices!

	By April 15 th	Regular Rate
o CIFPs Member or RRC®/CR® holder price	\$649.00 CAD	\$829.00 CAD
o Become a CIFPs member & attend the conference	\$799.00 CAD	\$979.00 CAD
o Non-Member price	\$949.00 CAD	\$1,129.00 CAD
o Companion Program (All Dates)	\$325.00 CAD	\$325.00 CAD

Registration fees are GST/HST exempt due to the United States location.

Ask about our special group prices!

Register via www.CIFPs.ca or call us at 1-866-933-0233; option #2 for early bird specials

¹ CFP®/CIFPs creates and/or sponsors its educational offerings in consideration of the continuing education guidelines set by Financial Planning Standards Council (FPSC). It is the responsibility of the CFP® professional to assess the appropriateness of this education content for purposes of claiming CE credits. Claim for 25 Verifiable CE credits includes completion of at least one CE title from the Advanced Financial Planning Stream. All claims are subject to review and approval by FPSC.



A familiar face on television, Darrin Rose is one of the stars of the CBC sitcom Mr. D, and is featured on MuchMusic's Video On Trial. He has been nominated for two Canadian Comedy Awards, as Best Male Stand-Up in 2011 and Best Newcomer in 2007. He has appeared on NBC's Last Comic Standing. He has twice performed at the Just For Laughs festival, plus the Halifax Comedy Festival, and his one man show "What's Potpourri?" received four stars at the Edinburgh Comedy Festival in 2010. His half hour stand up special debuted on CTV/Comedy Network in 2011.

Darrin was nominated for two Canadian Screenwriting Awards for comedy, in 2009 and 2010. In 2004, he was nominated for the Tim Sims Award as one of the best new comics in Toronto. He tours across Canada and the United Kingdom.

In addition to NBC and MuchMusic, he has appeared on the Comedy Network, CBC, Britain's NutsTV, XM Satellite Radio, and MTV Live.

» **Jan F. Kallmorgen**

Partner and Head of Investor Advisory - Interel Group



Jan is a partner at the international Public Affairs Consultancy Interel (www.interelgroup.com), where he heads the Global Investor Advisory Practice. He is also a partner at the EuroAtlantic Group (www.euroatlantic.eu), a global family office and geostrategic advisory firm.

He combines a background in international policy and finance to advise investment funds and asset managers on political risks, government affairs and strategic communications. His focus is on macro and geopolitical developments affecting markets and transactions.

Working closely with a group of former top diplomats and government members he offers clients a "private foreign service" helping them navigating politics in more than 50 countries.

Jan started his career as an investment manager at Goldman Sachs, was Director of the Transatlantic Program at the German Council on Foreign Relations and Managing Director of the European Group for Investor Protection before he started his own public affairs firm, Bohnen Kallmorgen & Partner. From there he moved to Interel in 2014. As a non-profit activity, Jan co-founded and chairs the think tank Atlantic Initiative, which hosts the largest online platform on foreign policy in Europe, atlantic-community.org.

He is a graduate from Freie Universität Berlin and Georgetown's School of Foreign Service with Masters in History and International Relation. A committed transatlanticist, Jan is a Young Leader of the American Council on Germany, Atlantik-Bruecke and BMW Foundation and speaks frequently at international conferences.

» **David Frum**

High-profile Political Analyst, Senior Editor at The Atlantic



"My mother cared more about how you reasoned than about the conclusions you reached." – David Frum

David Frum is the author of eight books, including most recently the e-book Why Romney Lost and his first novel, Patriots. In 2001-2002, he served as speechwriter and special assistant to President George W. Bush; in 2007-2008, as senior adviser to the Rudy Giuliani presidential campaign.

Frum is a Canadian conscience in the mainstream of often-polarized American politics.

In quest for the truth, he sometimes criticizes his own Republican Party as a television analyst and newspaper and blog contributor.

As an advisor and speech writer for U.S. President George W. Bush, he coined the term "Axis of Evil" to describe American enemies Iran, Iraq and North Korea.

During those controversial times, while giving a Vancouver speech under security protection, David stayed for several hours to answer every question posed to him, even those who disagreed or booed him.

Little wonder the Wall Street Journal dubbed him one of the leading politician commentators of his generation for his work in The Atlantic, Newsweek, The Daily Beast and on CNN. He has been called one of the top 100 public intellectuals in America.

David is author of eight books, including the novel Patriots in 2012.

Among other things, he is an expert on Canadian-American relations, leading discussions on social and political issues. Audiences appreciate his ideas-provoking style and ability to boil complex subjects into digestible bites.

CIFPs 14th ANNUAL CONFERENCE

2016

Preliminary Agenda

REGISTRATION INFORMATION

Register NOW for the best rates!

- Conference registration includes admission to all keynote addresses, breakout educational sessions, exhibits, meals, the welcome reception and dinner and all conference materials
- Register at: 1-866-933-0233, option 2 or <https://www.CIFPs.ca/Conference> or by completing the enclosed registration form and faxing it to (647) 723-6457

Continuing Education Credits

- Attending the conference and completing the related quizzes will allow you to claim up to 25 FPSC verifiable CE credits (pre-approval pending), 20 Insurance credits or 10 IIROC credits.

The CIFPs Conference is based on continuing education guidelines set by Financial Planning Standards Council (FPSC). It is the sole responsibility of the CFP® professional to assess the appropriateness of his or her CE activities in accordance with these guidelines.

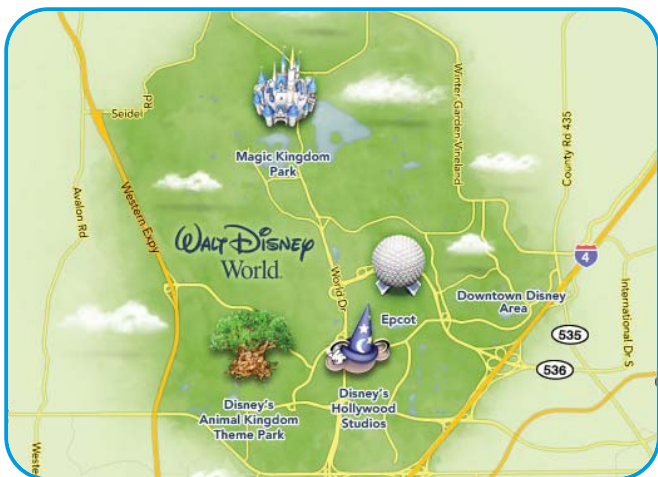
More reasons to attend

- Tradeshow Exhibition showcasing the latest in products and services
- Special events
- Opportunities to network with financial planners from across Canada

CIFPs Companion Program

- A great way for your spouse and/or children to also enjoy our Conference
- Adult Program includes all meals, events and sessions at a special rate (optional)
- Child Program includes all meals and events at a special rate (optional)

Map of the Area



Explore the Theme Parks in Walt Disney World®

Make all your dreams come true in four uniquely themed Parks and two Water Parks, each with its own special version of Disney magic! Fantasy becomes real and reality becomes fantastic as you relive childhood memories and create new ones.



Disney's Magic Kingdom®

Fairytale dreams come true for children of all ages at Magic Kingdom park. Delight in classic attractions, enchanting fireworks, musical parades and beloved Disney Characters across 6 whimsical lands. See fantasy become a reality as you explore Adventureland, Frontierland, Liberty Square, Fantasyland, Tomorrowland and Main Street, U.S.A. areas. Zoom through space, become a swashbuckling pirate and watch fireworks light up the sky over Cinderella Castle.

Some of the must see attractions in the Magic Kingdom® are Monsters, Inc. Laugh Floor, Mickey's PhilharMagic, Wishes™ Nighttime Spectacular, Buzz Lightyear's Space Ranger Spin, Space Mountain®, Seven Dwarfs Mine Train and the Haunted Mansion.



Disney's Hollywood Studios™

Movie magic comes to life at Disney's Hollywood Studios, awash in the glitz and glamour of Hollywood's Golden Age. Step into the action with attractions based on blockbuster movies and top TV shows, and delight in exciting entertainment that puts you center stage. With the vibrancy of a bustling movie set, this park features 8 sections: Hollywood Boulevard, Echo Lake, Sunset Boulevard, Streets of America, Commissary Lane, Pixar Place, Mickey Avenue and Animation Courtyard areas.

Some of the must see attractions are The Twilight Zone Tower of Terror™, Rock 'n' Roller Coaster® Starring Aerosmith, Muppet*Vision 3D, Fantasmic!, Disney Junior - Live on Stage!, Beauty and the Beast - Live on Stage! and Indiana Jones™ Epic Stunt Spectacular!.



Disney's Epcot®

Explore exciting attractions, enchanting international pavilions, award-winning fireworks and seasonal special events. Celebrating the human spirit, Epcot has 2 distinct realms: Future World, which features technological innovations, and World Showcase, which shares with Guests the culture and cuisine of 11 countries: Mexico, Norway, China, Germany, Italy, the United States, Japan, Morocco, France, United Kingdom and Canada.

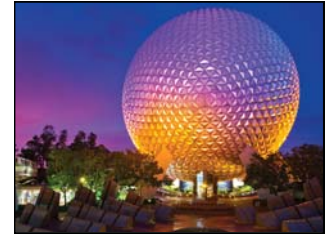
Some of the must see attractions in Epcot® are The Seas with Nemo & Friends, Mission: SPACE, Test Track, Turtle Talk with Crush, IllumiNations: Reflections of Earth, Disney & Pixar Short Film Festival and the Journey Into Imagination With Figment.



Disney's Animal Kingdom®

Encounter exotic animals and exciting adventures at Disney's Animal Kingdom park, one of the largest animal theme parks in the world. Home to more than 2,000 animals across 300 species, the park reflects Walt Disney's dedication to conservation and is committed to animal care, education and research. Explore 6 enthralling lands: Oasis, Discovery Island, Africa, Rafiki's Planet Watch, Asia and DinoLand, U.S.A. areas.

Some of the must see attractions in Disney's Animal Kingdom are Finding Nemo - The Musical, Kilimanjaro Safaris®, DINOSAUR, Festival of the Lion King, It's Tough to be a Bug!®, Kali River Rapids®, and Encounters - The Kingdom Takes Flight.



Disney Springs® (formerly Downtown Disney® Area)

Welcome to Disney Springs—a truly amazing place featuring an eclectic mix of unique boutiques, one-of-a-kind eateries and jaw-dropping entertainment that will have you wondering where the day went. Explore Disney Springs®, home to the largest Disney character store in the world. Day or night, an eclectic mix of fun-filled moments awaits you. Uncover a wide variety of exciting possibilities from unique specialty acts and live music to awe-inspiring shows.



Universal Studios® Florida - Jump into the Action of the Movies!

Go behind the scenes, beyond the screen, and jump right into the action of your favorite movies at Universal Studios®, the world's premier movie and TV based theme park.

Unforgettable thrills and magical experiences await at The Wizarding World of Harry Potter™ - Diagon Alley™, at Universal Orlando® Resort. Dine at the Leaky Cauldron™, shop at Weasleys' Wizard Wheezes, and get ready for an adventure on the multi-dimensional thrill ride, Harry Potter and the Escape from Gringotts™. Plus, travel to The Wizarding World of Harry Potter™ - Hogsmeade™ on the Hogwarts™ Express®.

At this real, working film and TV production facility you'll find an amazing array of rides, shows, movie sets and attractions that put you right in the picture. You can battle alongside Optimus Prime and Bumblebee in TRANSFORMERS: The Ride – 3D, visit Springfield to experience the Simpson Ride™ and join Gru and his Minions on an adventure in Despicable Me Minion Mayhem.



Universal's Islands of Adventure® - Live the AdventureSM of a Lifetime!

Around every bend is another epic adventure. Around every corner awaits another once-in-a-lifetime thrill. Take an unforgettable journey through the uniquely themed islands of Universal's Islands of Adventure®, where the world's most cutting edge rides, shows and interactive attractions bring your favorite stories, myths, cartoons, comic book heroes and children's tales to life.

Join the battle of good versus evil above the streets of Marvel Super Hero Island®. Get splash happy with your favorite cartoon characters in the water rides of Toon Lagoon®. Come face to face with the dinosaurs of Jurassic Park®. Venture through the mists of time as you experience the epic adventures of The Lost Continent®. And step right into the pages of the children's books of Dr. Seuss in Seuss Landing™. Islands of Adventure is the stuff legends are made of.

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Claim up to 25 FPSC verifiable CE credits¹ (pre-approval pending), 20 Insurance credits or 10 IIROC credits.

Walt Disney World SWAN AND DOLPHIN RESORT – Orlando, Florida

Wednesday, May 18th, 2016 to Saturday, May 21st, 2016



Disney's Boardwalk



© Disney



Conference Hotel Information:

IDEALLY SITUATED BETWEEN WONDER AND WONDERFUL.

Leave the every day behind and enter a world of wonder and enchantment at the **Walt Disney World**® Resort. Located in the heart of the most magical place on earth, the **Walt Disney World Swan and Dolphin Resort** provides a truly extraordinary backdrop for your Orlando vacation or meeting. Beautiful tropical landscaping, tranquil waterways and classic art and architecture work together to create a stunning landmark in the midst of one of the most spectacular places on earth.

Take Advantage of the Complimentary Disney Transportation, it is much faster and much more convenient to use Disney's complimentary scheduled transportation available only to Disney Resort guests. Take a leisurely cruise on Disney's Friendship Launch to **Epcot**® and **Disney's Hollywood Studios**™ or take a Disney shuttle bus to all other areas and Disney resorts within **Walt Disney World**® Resort. The buses and Friendship launch start running one hour prior to the parks opening each morning and arrive at our hotel every 15 – 20 minutes so you can come and go as you please with very little wait time. The water taxis and buses transport guests right to the entrance of the parks. No additional shuttles are required and no walking through massive parking lots.

Walt Disney World Swan and Dolphin Resort
1500 Epcot Resort Boulevard, Lake Buena Vista, Florida 32830 United States
Tel: 407-934-4000 Toll-Free: 1-888-828-8850

Hotel Website: <http://www.swandolphin.com>

Traditional Room: \$199.00 USD per night (plus taxes)

Deluxe Room: \$229.00 USD per night (plus taxes)

(Please note: Upon booking the first night is charged to your card as a deposit.)

Please call CIFPs for Hotel Reservations
at 1-866-933-0233, option 2

Flight Information:

WestJet and Air Canada fly to Orlando from all of the major Canadian cities.

WestJet has offered our delegates a **10% discount**, for details please visit www.CIFPs.ca/Conference

Shuttle Bus Information:

Mears Transportation group is offering discounted shuttle service from the Orlando International Airport to the conference hotel. For details please visit www.CIFPs.ca/Conference

Walt Disney World Tickets:

Make all your dreams come true in four uniquely themed Parks and two Water Parks, each with its own special version of Disney magic! Fantasy becomes real and reality becomes fantastic as you relive childhood memories and create new ones.

Visit www.CIFPs.ca/Conference to find out how to order **Disney Convention Tickets** at a special rate.

Extra Magic Hours:

As a Guest at the Walt Disney World Swan and Dolphin Resort hotel, you'll get more time to experience select attractions—each day, one of the theme parks opens early or stays open after regular park closing for **Extra Magic Hours!**