



Best Practices CE Session Protect Your Practice



The Experts



William M. Barnstead, **LL.B.**
Litigation and Claims
Management Counsel

William Barnstead previously held the position of Litigation and Claims Manager at ClaimsPro Inc., the largest independent adjusting firm in Canada, with over 110 branches coast-to-coast.

In his capacity as Litigation and Claims Manager, William led the unique APA Triage Process which is just one of the key features that sets this program apart from its competitors. This feature is designed to provide plan participants with timely advice when advisors need it the most. William was also involved with the administration of the APA-sponsored Errors and Omissions Insurance Program.

A 1998 graduate of the University of Manitoba law school, William was called to the Manitoba Bar in 1999.



Jack Mazakian
Executive Vice President
Leader, Regional Financial Institution Practice
Willis Canada Inc.

With over 18 years of experience in the insurance industry, Jack Mazakian has served in key positions both as an underwriter and a broker with several leading firms. He began his career in 1986 with AIG as a Professional Liability Underwriter. In 1989 he moved to the brokerage side of the insurance business in the Financial Institutions Executive Risk Division of a major Canadian brokerage and attained various senior roles while maintaining responsibility for large Canadian and global clients.

Jack is a founding partner of Willis Canada Inc., a new Toronto broker he helped establish in 1997. Jack specialized in both financial institution and executive risk, building a dedicated team to serve clients in either specialty. With the success of this team, Jack was promoted to Managing Partner in 2000. Ultimately his duties included the development and management of Corporate Sales for Ontario as well as the responsibilities of Account Director and Financial Services and Executive Risks Practice Leader.

Today The Willis Group is one of the world's largest professional services firms specializing in risk management, with approximately 200 professionals operating from branches in Toronto, Calgary and Vancouver. In his current role, Jack has management responsibility for Financial Institutions Practice.

The Moderator



Roger McMillan, **CFP, CLU, CH.F.C.**
President
McMillan Financial

A graduate of the University of Toronto with a major in Economics, Roger McMillan began his career with Canada Life in 1976, helping to design and market disability income products. Today Roger is president of McMillan Financial specializing in succession and estate planning for business-owners, focusing on life and health insurance. In addition he shares a partnership in cmBenefits, an employee benefits business.

A member of LUAC/CAIFA/Advocis since 1972, Roger is a Past Chair of The Financial Advisors Association of Canada. He was a member of the CAIFA Board of Directors during the merger of CAIFA and CAFPA and was president of the CAIFA Toronto Chapter

in 1993.

In recent years Roger has served on a number of Advocis national committees including Chair of the Best Practices Committee, as well as representing Advocis on the OSC Fair Dealing Model sub-committee. He continues his active volunteerism today as the 2008/2009 chair of the APA Board of Directors which he has served on since 2004. Roger's years of experience in the industry have been invaluable in helping to guide the APA through its formative years by maintaining a focus on the long term strategic and operational requirements for developing the APA self-funded plan.

Roger is also a member of the Conference for Advanced Life Underwriting ("CALU").



To learn more, please visit:
www.advocis.ca
www.apa-ins.ca

