



Chapter Guide

Risk Management Series

Advocis 

Table of Contents

Table of Contents	2
Pricing (Members and Non-members).....	3
Revenue Sharing.....	3
Promoting the Program.....	3
Learning Objective	3
Participant Eligibility	3
What Participants Need	3
Facilitator Resources.....	3
Event Format.....	4
Suggestion on How to Run your Event	4
CE Accreditation.....	4
Questions	4

Pricing (Members and Non-members)

1. Members: \$25 minimum (\$25 remitted back to National)
2. Non-Members: \$40 minimum (\$40 remitted back to National)

Chapters will be responsible for refunds related to seminar registrants.

Revenue Sharing

1. Chapters are required to remit \$25 for members and \$40 for non-members for seminar attendees.
2. Full accounting and allocation must occur within 30 business days following the seminar.

Important: If multiple chapters wish to hold the event together, revenue sharing will be left to the discretion of the chapters involved, as documented in a joint agreement.

Promoting the Program

The main vehicles for chapters to promote this program will be email, social media, “word-of-mouth” marketing, and the display and distribution of collateral materials.

The target audiences for this course are:

- Financial advisors of all experience levels, members or non-members of Advocis.

Learning Objective

The objective of the Risk Management Series is to help advisors mitigate risks and maximize success by ensuring they know what E&O coverage is right for them and other common pitfalls advisors are sure to face.

Participant Eligibility

The Risk Management Series is for all Financial Advisors and Planners regardless of experience level.

What Participants Need

Participants will need:

- Blank paper or notepad
- A copy of the Risk Management Discussion Questions

Facilitator Resources

Upon submission of the online **Risk Management Series Registration Form** available on Chapter Central, the facilitator will receive access to the following resources:

Resource	Details	Format
Chapter Guide	The Chapter Guide outlines available facilitator resources and recommendations on how to run your event.	PDF
Videos	The videos to play in the events.	MP4
Reference Documents	Risk Management Discussion Questions	PDF

Event Format

The following is how to run the event.

Suggestion on How to Run your Event

1. Book time with Jack Mazakian ahead of your event. Before you confirm your event date and time, contact ABS at least 2 months ahead of your event to check Jack Mazakian's availability. Contact ABS at info@absinc.ca.
2. **For in-person events**, provide each participant with blank paper and a print a copy of the Risk Management Discussion Questions.
For virtual events, send the pdf copies of the Risk Management Discussion Questions.
3. After playing the video, put up the Risk Management Discussion Questions to review with Jack.

CE Accreditation

Each of the modules in the Risk Management Series have been accredited with The Institute for 1.5 CE.

Questions

If you have questions, concerns, or comments regarding the facilitator resources, please contact Maja Golich, Education Coordinator via email at mgolich@advocis.ca.