

# Advocis Symposium

## 2020 Virtual Discussion Events

### Segment 1

What's in a Name?

0.75 - CE\*

### Segment 3

The Importance of Trust  
in Professional Relationships

1 - CE (Ethics and Professional Responsibility)\*

### Segment 2

Regulation in the Time of COVID

0.75 - CE\*

### Segment 4

The Impact of Changing Demographics  
on Financial Advice

1 - CE\*

\*Participation in the virtual discussion is mandatory

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### Segment 1

#### What's in a Name?

0.75 CE\*

In it's 2019 budget, Ontario announced it will be restricting the use of the titles Financial Advisor and Financial Planner to individuals holding a recognized designation. In Symposium 2020 we provide an update on where this stands and answer many questions on the proposed legislation.

Watch the video and participate in the discussion session to explore this subject with your network of peers.

\*Participation in the virtual discussion is mandatory

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## 2020 Virtual Discussion Events

### Segment 2

#### Regulation in the Time of COVID

0.75 CE\*

Discover how companies and regulators have adjusted during COVID and which changes may be here to stay after the pandemic.

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## 2020 Virtual Discussion Events

### Segment 3

#### The Importance of Trust in Professional Relationships

1 - CE (Ethics and Professional Responsibility)\*

In this session Rod Burylo discusses the important ideas about ethics, trust and values in relation to working with your clients.

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## 2020 Virtual Discussion Events

### Segment 4

#### The Impact of Changing Demographics on Financial Advice

1 - CE\*

Canada is undergoing a demographic shift, we are living longer than ever, which creates challenges for traditional retirement planning. The next generation of consumers often have atypical employment and family situations and they seek modern solutions.

Watch the video and participate in the discussion session to explore this subject with your network of peers.

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