

LIST OF PAST PRESENTATIONS:

March 26/27, 2024 CPA Ontario, online, Full Day Workshop
November 15, 2023 - CPA Ontario - Toronto, Full Day Workshop
November 7/8, 2023 CPA BC, online, Full Day Workshop
September 12/13, 2023 - CPA Ontario - online, Full Day Workshop
July 12, 2023 – Advocis School, Kelowna B.C.
April 5, 2023 - Retirement Management Executive Forum, on-line
December 13/14, 2022 - CPA Ontario – online, Full Day Workshop
November 29/30, 2022 - CPA Ontario – online, Full Day Workshop
April 13, 2021 - Ottawa Share Club, 7pm, online, "Pitfalls of Retirement Income Planning"
February 19, 2021 – Retirement Income Journal, Demonstration of Otar Retirement Calculator
December 15/16, 2020 - CPA Ontario - online, Full Day Workshop
October 28/29, 2020 - CPA Ontario - online, Full Day Workshop
September 15/16, 2020 - CPA Ontario - online, Full Day Workshop
August 14, 2020 - CPA BC - On-line, Full Day Workshop
July 28/29, 2020 - CPA Ontario - online, Full Day Workshop
June 3, 2020 - On-line, CPA BC, "COVID-19 and Portfolio Volatility"
June 2, 2020 - On-line, CPA Alberta, "COVID-19 and Portfolio Volatility"
May 7, 2020 - CPA Ontario - On-line, Full Day Workshop
November 27, 2019 - CPA Ontario - Ottawa, Full Day Workshop
November 6, 2019 - CPA Ontario - Vaughan, Full Day Workshop
September 9, 2019 - CPA Ontario - Toronto, Full Day Workshop
December 14, 2018 - CPA Ontario – Hamilton, Full Day Workshop
November 28, 2018 - CPA Ontario – Vaughan, Full Day Workshop
November 19, 2018 – Vancouver, BC – CPA BC Full Day Workshop
November 12, 2018 - CPA Ontario – Thunder Bay, Full Day Workshop
September 21, 2018 - CPA Ontario - Ottawa, Full Day Workshop
July 13, 2018 - CPA Ontario - London, Full Day Workshop
June 12, 2018 – Victoria, BC – CPA BC Full Day Workshop
June 11, 2018 – Vancouver, BC – CPA BC Full Day Workshop
November 16, 2017 - CPABC - Vancouver, Full Day Workshop
November 9, 2017 - CPA Ontario - Waterloo, Full Day Workshop
October 27, 2017 - CPA Ontario - Oshawa, Full Day Workshop
September 18, 2017 - Toronto, IMCA
June 13, 2017 – Vancouver, BC – CPA BC Full Day Workshop
June 12, 2017 – Coquitlam, BC – CPA BC Full Day Workshop
April 26, 2017 - CPA Ontario - Toronto, Full Day Workshop
March 7, 2017 - CPA Ontario - Toronto, Full Day Workshop
December 8, 2016 CPA Ontario Workshop (Full Day), Barrie, ON
November 22, 2016 – Victoria, BC – CPA BC Full Day Workshop
November 21, 2016 – Vancouver, BC – CPA BC Full Day Workshop
November 9, 2016 CPA Ontario Workshop (Full Day), Niagara Falls, ON
October 26, 2016 CPA Manitoba Workshop (Full Day), Winnipeg, MB
September 29, 2016 – CUNA, Newport Beach, California
April 28, 2016 – Vancouver, Canada – CFA Vancouver
March 15, 2016 CPA Ontario Workshop (Full Day), Markham, ON

December 4, 2015 IMCA Winter Specialty Conference, Phoenix, AZ
December 3, 2015 CPA Ontario Workshop (Full Day), Vaughan, ON
November 26, 2015 CPA Ontario Workshop (Full Day), Kitchener, ON
November 25, 2015 Advocis, Mississauga, ON
November 6, 2015 – Toronto, Ontario – CPA Full Day Workshop
November 3, 2015 – Vancouver, BC – CPA BC Full Day Workshop
October 29, 2015 - Toronto, Canada – MFDA Senior’s Summit
June 25, 2015 - Markham, Ontario – CPA Ontario Full Day Workshop
March 31, 2015 – Toronto, Ontario – RBC Wealth Management Spring Financial Planning Conference
January 19, 2015 - Toronto, Ontario – CPA Ontario Full Day Workshop
December 12, 2014 - Toronto, Ontario – CPA Ontario Full Day Workshop
December 9, 2014 - Ottawa, Ontario – CPA Ontario Full Day Workshop
December 2, 2014 – Toronto, Canada – CFA Toronto
November 24, 2014 - Mississauga, Canada – CPA Ontario
July 17, 2014 - London, Ontario - Institute of Chartered Accountants of Ontario Full Day Workshop
June 25, 2014 - Barrie, Ontario - Institute of Chartered Accountants of Ontario Full Day Workshop
May 14, 2014 - NAPFA Spring Conference, Salt Lake City, USA
February 14, 2014 - Toronto, Canada – MFDA Staff Education Conference
February 13, 2014 - Calgary, Canada – Advocis Calgary Chapter
February 6, 2014 - Calgary, Canada - Institute of Chartered Accountants of Alberta
February 5, 2014 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
December 10, 2013 - Markham, Canada - Institute of Chartered Accountants of Ontario
November 28, 2013 - Toronto, Canada - Certified General Accountants of Ontario
November 6, 2013 - Victoria, Canada - Institute of Chartered Accountants of BC
November 5, 2013 - Vancouver, Canada - Institute of Chartered Accountants of BC
November 4, 2013 - Kelowna, Canada - Institute of Chartered Accountants of BC
October 17, 2013 - Mississauga, Canada - CIFP
July 18, 2013, 2013 - Toronto, Canada - Institute of Chartered Accountants of Ontario
April 18, 2013 – London, Canada – Advocis London Chapter
March 26, 2013 - Calgary, Canada – Advocis Calgary Chapter
March 21, 2013 – Seattle, WA – MTA Puget Sound Chapter
February 19/21, 2013 – Atlanta, Georgia - CUNA
January 17, 2013 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
January 16, 2013 - Calgary, Canada - Institute of Chartered Accountants of Alberta
December 6, 2012 - Toronto, ON - Certified General Accountants
November 20, 2012 – Vancouver, BC - Institute of Chartered Accountants of B.C.
November 19, 2012 – Victoria, BC - Institute of Chartered Accountants of B.C.
November 7, 2012 – Baltimore, MD, NAPFA East Conference
July 13, 2012 – Lake Geneva, WI – Woodbury Financial
June 6, 2012 – Toronto, ON – CFA Institute Toronto Chapter
May 31, 2012 – Washington, D.C. - Merrill Retirement University
May 8, 2012 – Naples, FL - Merrill Retirement University
May 7, 2012 – Miami, FL - Allianz
April 19, 2012 – Vancouver, BC – PPI
April 18, 2012 – Cleveland, OH – Society of FSP
April 3, 2012 – NYC, NY – Structured Products Association
February 10, 2012 - Calgary, Canada - Institute of Chartered Accountants of Alberta
February 9, 2012 - Edmonton, Canada - Institute of Chartered Accountants of Alberta

December 7, 2011 - Toronto, ON - Certified General Accountants
December 6, 2011 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
November 22, 2011 – Victoria, BC - Institute of Chartered Accountants of B.C.
November 21, 2011 – Vancouver, BC - Institute of Chartered Accountants of B.C.
November 18, 2011 - Toronto, ON – Retirement Planning Association of Canada
November 8, 2011 - Toronto, ON - Certified General Accountants
October 25, 2011 – Miami, FL - Allianz
October 12-13, 2011 – Minneapolis, MN - Allianz
September 23, 2011 - Victoria, BC - Certified General Accountants
August 19, 2011 – Salt Lake City -
June 8, 2011 – Roseville, CA -
June 7, 2011 – Oakland, CA -
May 24, 2011 – San Jose, CA - Allianz
May 19, 2011 – Richmond, VA -
May 18, 2011 – Baltimore, MD -
May 5, 2011 – Las Vegas, NV - Lincoln Financial (The Resource Group)
April 27, 2011 – Brookfield, WI -
April 26, 2011 – Chicago, IL -
April 19, 2011 – Minneapolis, MN-
April 12, 2011 – St. Louis, MO- Allianz
March 31, 2011 – Louisville, KY - Allianz
March 30, 2011 – Granger, IN - Allianz
March 29, 2011 – Peoria, IL - Allianz
March 28, 2011 – Phoenix, AZ - Allianz
March 24, 2011 – Charlotte, NC - Allianz
March 17, 2011 – Melville, NY - Allianz
March 14, 2011 – Vancouver, BC - Institute of Chartered Accountants of B.C.
March 10, 2011 – Detroit, MI - Allianz
March 3, 2011 – Washington, DC - Allianz
March 1, 2011 – Birmingham, AL - Allianz
February 23, 2011 – Newton, MA-
February 10, 2011 – Cambridge, ON, Canada – Advocis Golden Triangle
February 3, 2011 – Parsippany, NJ-
December 16, 2010 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
December 9, 2010 – NY, NY - Allianz
November 25, 2010 - Vancouver, BC - Certified General Accountants
November 15, 2010 – Financial Behaviour in Retirement Summit, Chicago, IL
November 10, 2010 - Calgary, Canada - Institute of Chartered Accountants of Alberta
November 9, 2010 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 3, 2010 – Cleveland, OH – Allianz
October 29, 2010 – Baltimore, MD, MACPA
September 24, 2010 – Banff, AB, Canada - Institute of Advanced Financial Planning
August 18-19, 2010 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
August 10, 2010 – Philadelphia, PA – Allianz
June 21, 2010 – Vancouver, BC - Institute of Chartered Accountants of B.C.
June 10, 2010 – Montreal, Canada - Standard Life
May 28, 2010 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
May 5, 2010 – Flint & Troy, MI – Allianz

April 21 – Las Vegas, NV – Lincoln Financial (The Resource Group)
March 23, 2010 – Chicago, IL – Retirement Income Industry Association
March 3, 2010 - Toronto, Canada - Metro Toronto Library
February 11, 2010 – Newport Beach, CA - Allianz
February 10, 2010 – Pasadena, CA - Allianz
February 10, 2010 – Woodland Hills, CA - Allianz
February 9, 2010 – Roseville, CA - Allianz
February 9, 2010 – San Mateo, CA - Allianz
January 18, 2010 - Orlando, FL - AICPA
December 9-10, 2009 - Phoenix, AZ - Allianz
December 8, 2009 - Salt Lake City, UT - Allianz
December 7, 2009 - Seattle, WA - Allianz
November 2, 2009 - Seattle, WA - MTA Seattle Chapter
December 1, 2009 - Vancouver, BC - Certified General Accountants
November 17, 2009 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 16, 2009 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 12, 2009 - Uncasville, CT - Allianz
November 9, 2009 - Vancouver, BC - Institute of Chartered Accountants of B.C.
November 5, 2009 - Birmingham, AL - Allianz
November 4, 2009 - Troy, MI - Allianz
November 3, 2009 - Northbrook and Oak Brook, IL - Allianz
October 30, 2009 - Hershey, PA - PA Bankers
October 29, 2009 - King of Prussia and Harrisburg, PA - Allianz
October 28, 2009 - Red Bank, NJ and Philadelphia, PA- Allianz
October 27, 2009 - NYC and Melville, NY - Allianz
October 26, 2009 - Parsippany, NJ - Allianz
October 20, 2009 - Ingersoll, ON - Financial Horizons
October 16, 2009 - Vancouver, BC - Raymond James
October 13, 2009 - Cleveland, OH - Allianz
October 7, 2009 - Birmingham, AL - Ohio National
October 6, 2009 - Atlanta, GA - Ohio National
August 14, 2009 - Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program of Brokerage Business & Wealth Management
June 15, 2009 - Vancouver, BC - Institute of Chartered Accountants of B.C.
June 5, 2009 - Calgary, Alberta - Institute of Chartered Accountants of Alberta
June 4, 2009 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
March 26-26, 2009 - Buffalo, Rochester, NY - Allianz
January 23, 2009 - Atlanta, GA - Integrated Financial Group
December 3, 2008 - New York, NY - MetLife
November 18, 2008 - Calgary, Canada - Institute of Chartered Accountants of Alberta
November 17, 2008 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 14, 2008 - Richmond, VA - MetLife
November 13, 2008 - Pittsburgh, PA - MetLife
November 11, 2008 - Louisville, KY - MetLife
November 7, 2008 - Tulsa, OK - Allianz
November 6, 2008 - New Orleans, LA - Allianz
November 5, 2008 - Austin and San Antonio, TX - Allianz
October 29, 2008 - Kelowna, BC - Institute of Chartered Accountants of B.C.

October 28, 2008 - Vancouver, BC - Institute of Chartered Accountants of B.C.
October 27, 2008 - Vancouver, BC - Great West Life
October 23, 2008 - Atlantic City, NJ - MetLife
October 21, 2008 - Phoenix, AZ - Pacific Life
October 17, 2008 - Bay Harbor, MI - MetLife
October 15, 2008 - Dallas, TX - Allianz
October 14, 2008 - Houston, TX - Allianz
October 10, 2008 - Boston, MA - MetLife
October 8, 2008 - Little Rock, AR - Allianz
October 7, 2008 - St. Louis, MO - Allianz
October 3, 2008 - Vancouver, BC - London Life
September 26, 2008 - Kansas City, MO - Allianz
September 25, 2008 - Colorado Springs, CO - Allianz
September 24, 2008 - Denver, CO - Allianz
September 23, 2008 - Oklahoma City, OK - Allianz
September 19, 2008 - New Orleans, LA - MetLife
August 17-21, 2008 - Banff, AB, Banff School, Advocis - The Financial Advisors Association of Canada
August 15, 2008 - Newport Beach, CA - Pacific Life
August 7-8, 2008 – Toronto, ON - Canadian Securities Institute
July 22, 2008 - Buffalo, Rochester and E. Syracuse, NY - MetLife
July 18, 2008 - Newport Beach, CA - Pacific Life
July 2-3, 2008 – Toronto, ON - Canadian Securities Institute
June 27, 2008 - Newport Beach, CA - Pacific Life
June 19, 2008 – Toronto, ON - Canadian Securities Institute
June 16, 2008 – Vancouver, BC - Institute of Chartered Accountants of B.C.
June 10, 2008 - Sacramento and Berkeley, CA, Phoenix Annuities
June 9, 2008 – Del Mar, CA –
June 3, 2008 - Cleveland, OH – MetLife
June 2, 2008 - Pittsburgh, PA – MetLife
May 22, 2008 - Vancouver, BC - Certified General Accountants
May 20, 2008 - Miami, FL - FPA, Miami Dade Chapter 3rd Annual Conference
May 16, 2008 - Newport Beach, CA - Pacific Life
May 15, 2008 - Dallas, TX - 1st Global
May 14, 2008 - King of Prussia, PA - MetLife
May 8, 2008 - Hartford, CT - Allianz
May 7, 2008 - Tarrytown, NY – Allianz
May 6, 2008 – Melville, NY – Allianz
May 2, 2008 - Buffalo and Rochester, NY, MetLife
May 1, 2008 - Rochester, NY – Allianz
April 30, 2008 - Las Vegas, NV – MetLife
April 25, 2008 - Atlanta, GA – MetLife
April 7, 2008 – Toronto, ON - Scarborough Retirement Counsel
April 3, 2008 - Troy, MI – Allianz
April 2, 2008 - Foxboro, MA - Allianz
April 1, 2008 - Pittsburgh, PA - Allianz
March 27, 2008 - Birmingham, AL – MetLife
March 25, 2008 - Tampa, FL –
March 7, 2008 - Memphis, TN – MetLife

March 6, 2008 - Charlotte, NC – Allianz
March 5, 2008 - Atlanta, GA – Allianz
March 4, 2008 - Orlando, FL – Allianz
February 21, 2008 - Jacksonville, FL – Allianz
February 20, 2008 - Tampa, FL – Allianz
February 19, 2008- Fort Lauderdale, FL - Allianz
February 13, 2008 - Sacramento, CA –
February 12, 2008 - San Francisco, CA –
February 8, 2008 - Atlanta, GA – MetLife
January 15, 2008 - Phoenix, AZ - Arizona Institute, Society of Financial Service Professionals
November 23, 2007 - Victoria, BC - Institute of Chartered Accountants of B.C.
November 22, 2007 - Vancouver, BC - Institute of Chartered Accountants of B.C.
November 20, 2007 - Calgary, AB - Institute of Chartered Accountants of Alberta
November 19, 2007 - Edmonton, AB - Institute of Chartered Accountants of Alberta
October 29, 2007 - Las Vegas, NV - Charles Schwab, IMPACT 2007
October 18, 2007 - Kitchener, ON - Advocis, Kitchener Chapter
October 10, 2007 - St. Augustine, FL - John Hancock
September 28, 2007 - Laguna Beach, CA - Pacific Life
August 4, 2007 - Kansas City, MO - Garrett Planning Network, 7th Annual Retreat
July 26, 2007 - Orlando, FL - Prudential Annuities
June 14, 2007 - Richmond Hill, ON - ING Wealth Management
June 12, 2007 - Denver, CO - Million Dollar Round Table
June 7, 2007 - Vancouver, BC - Certified General Accountants
June 1, 2007 - Campbellville, ON – Retirement Planning Association of Canada
May 14, 2007 – Toronto, ON - IMCA
May 10, 2007 – Toronto, ON - Strategy Institute
May 7, 2007 – Ottawa, ON – CALU 16th Annual Meeting
May 4, 2007 - Denver, CO - Main Street Securities
May 2, 2007 - Dallas, TX - Tolleson Wealth Management
April 19-20, 2007 - Allerton Park, IL, Society of Financial Service Professionals, Central Illinois Chapter
March 3, 2007 - Destin, Florida - John Hancock
February 19, 2007 - Vancouver, BC - Institute of Chartered Accountants of B.C.
February 10, 2007 - Laguna Beach, CA - John Hancock
February 8, 2007 - Orlando, FL - John Hancock
January 23, 2007 - Edmonton, AB - Institute of Chartered Accountants of Alberta
January 22, 2007 - Calgary, AB - Institute of Chartered Accountants of Alberta
January 11, 2007 - Boston, MA - John Hancock
January 3, 2007 - Chicago, IL - Popular Investments, National Sales Conference
November 8th, 2006 - Las Vegas, NV - 1st Global Capital Corp
November 2, 2006 - Washington, DC – IMCA, 2006 Advanced Wealth Management Conference
October 21, 2006 - Nashville, TN – FPA Annual Convention
October 17, 2006 - Palm Springs, CA - Society of Financial Service Professionals, Forum 2006
September 15, 2006 - Boston, MA - John Hancock, 2006 Manager's Forum
August 20, 2006 - Banff, AB - Banff School, Advocis - The Financial Advisors Association of Canada
June 27, 2006 – Toronto, ON - The Asset Planning Group
June 8, 2006 - Vancouver, BC - Institute of Chartered Accountants of B.C.
May 8, 2006 - Ottawa, ON – CALU, 15th Annual Meeting
February 9, 2006 – Toronto, ON - York University, Retirement Planning Centre

January 25, 2006 - West Palm Beach, FL - Society of Financial Services Professionals
January 9, 2006 - Markham, ON - PIP Financial
November 30, 2005 - Calgary, AB - Portfolio Analysts Inc.
November 28 - 29, 2005 - Calgary/Edmonton, AB - Institute of Chartered Accountants of Alberta
October 27, 2005 - Victoria, BC - ManuLife Financial, Regional Advanced Marketing Seminars
October 25-26, 2005 - Vancouver / Victoria, BC - Institute of Chartered Accountants of B.C.
September 18, 2005 - San Diego, CA - Financial Planning Association (FPA) Annual Convention & Exposition
September 15, 2005 - Ottawa, ON - Advocis - The Financial Advisors Association of Canada - Ottawa Chapter
June 23, 2005 - Toronto, ON - Advocis - The Financial Advisors Association of Canada - Toronto Chapter
June 20/23, 2005 - London/King City, ON - ManuLife Financial, Regional Advanced Marketing Seminars
June 13, 2005 - Dartmouth, NS - Institute of Chartered Accountants of Nova Scotia
June 7, 2005 - Calgary, AB - Institute of Chartered Accountants of Alberta
May 26, 2005 - Toronto, ON - Avenue Investments
April 26, 2005 - Hamilton, ON - Credential Group
April 22, 2005 - Allerton Park, IL - Society of Financial Service Professionals, Central Illinois Chapter
November 29/30, 2005 - Calgary/Edmonton, AB - Institute of Chartered Accountants of Alberta
October 15-16, 2004 - Tampa, FL - Society of Financial Service Professionals
October 2, 2004 - Niagara Falls, ON - Retirement Planning Association of Canada
March 11, 2004 - Toronto, ON - York University, "Mathematics of Retirement"
January 21, 2004 - Webcast - Society of Financial Service Professionals
October 26, 2003 - Toronto, ON - Institute of Advanced Financial Planners, 1st Annual Symposium
October 17, 2003 - Kingston, ON - Advocis - The Financial Advisors Association of Canada
October 9, 2003 - Kananaskis, AB - ManuLife Financial, Regional Advanced Marketing Seminars
June 16-17, 2003 - Toronto, ON - STEP (Society of Trust and Estate Practitioners), 5th National Conference
May 14, 2003 - Markham, ON - PIP Financial
May 9, 2003 - Burlington, ON - Retirement Planning Association of Canada
October 19-20, 2002 - Ottawa/Kingston, ON - Canadian MoneySaver Investment Conferences
September 18-19, 2002 - On Board Cruise STAR PRINCESS - Canadian MoneySaver Investment Conferences
May 7, 2002 - Toronto, ON - Phillips, Hager & North
March 7, 2002 - Toronto, ON - Equinox Financial
November 28/30, 2001 - Scottsdale, AZ - Canadian MoneySaver Investment Conferences
October 27-28, 2001 - Burlington & North York, ON - Canadian MoneySaver Investment Conferences
February 15, 2001 - Toronto, ON - Canadian Society of Technical Analysts
February 4, 2001 - Calgary, AB - Financial Forum
February 3, 2001 - Calgary, AB - Canadian MoneySaver Investment Conferences
October, 2000 - Windsor & London, ON - Canadian MoneySaver Investment Conferences
November 24, 1999 - Toronto, ON - Investment Learning Centre
October 23-24, 1999 - Kitchener & St. Catharines, ON - Canadian MoneySaver Investment Conferences
September 25-26, 1999 - Orillia & Peterborough, ON - Canadian MoneySaver Investment Conferences
January 30, 1998 - Toronto, ON - Financial Forum
March 13, 1997 - Toronto, ON - Canadian Corporate Shareholder Services Association