

## **LIST OF PAST PRESENTATIONS:**

November 15, 2023 - CPA Ontario - Toronto, Full Day Workshop  
November 7/8, 2023 CPA BC, online, 8:30 am - 12:30 pm  
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, 1<sup>st</sup> 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), 5<sup>th</sup> 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