

Monthly Platform Events Schedule - JANUARY

Meanings of Color

Platform Events

Carriers' Training

Events for Members' Guests

Carriers' 1-on-1 Case Studies

Reservation: RSVP is required to the Google calendar of admin@wayfinancial.ca and orientations take place in Boardroom unless otherwise specified.
Remarks: The strategies and opinions presented by external speakers are in their personal capacity and do not reflect the views of our company.

Week	Time	Monday	Tuesday	Wednesday	Thursday		Friday	Saturday
1st	11am - 12:30pm				HLLQP Exam Preparation <i>Stephen Lai</i>		Harness the Power of Par Whole Life Cash Value <i>EL Monica Zhang</i>	
	2pm			1-on-1 Case Studies <i>RBC Mike Jackson</i>			1-on-1 Case Studies <i>EL Monica Zhang</i>	
	4pm				Career Orientation			
	7pm - 8pm				The Secret Tax Playbook <i>William Liu</i> <i>3rd Floor</i>			
2nd	11am - 12:30pm				HLLQP Exam Preparation <i>Stephen Lai</i> <i>(Lounge)</i>	RESP Monthly Training: Review the Compliance and Suitability Requirements for Selling RESP Plans <i>Jennifer Chan</i>	Lunch & Learn: Large Case Underwriting <i>CL Carol Ng</i>	
	2pm		MDRT Training: Whole Person #1 * Age of Abundance * Are You Relevant * How MDRT Mentors Changed My Life				1-on-1 Case Studies <i>CL Carol Ng</i>	
	4pm		* If you Cannot Stand up Stand out * Learning to Laugh Again * Personal Creativity and Innovation					

3rd	11am - 12:30pm			Case Study and Share #1 <i>Carmen Ke</i>	HLLQP Exam Preparation <i>Jack Cao</i>	Market Trends - Are they Headwinds or Opportunities? <i>RBC Mike Jackson</i>	
	2pm		MDRT Training: Marketing #1 * Marketing Strategies toward Top of the Table * Playing for Change * Paychecks and Play checks * Never Tell Me Never * Networking * Mining for New Clients * Million Meal Challenge	1-on-1 Case Studies <i>CL Tajammul Pannun</i>			
	4pm				Career Orientation		
4th	11am - 12:30pm			3 Ways and 7 Strategies of Property Tax Program <i>Simon Mok</i>	HLLQP Exam Preparation <i>Jack Cao</i>	CI, Let's Start the Conversation <i>IA Anita Bennett</i>	Business Start-up Training #5: Prospecting Skills <i>Ryan Lee</i> <i>(10am - 11:30am, 3rd Floor)</i>
	2pm		MDRT Training: Selling #1 * Capitalizing on the * Opportunity Value of Cash * The Unseen Dynamics Powering China The Developing World and Driving Globalization * True Success			RESP Exam Preparation <i>Jennifer Chan</i>	
	4pm						
5th	11am - 12:30pm				HLLQP Exam Preparation <i>Jack Cao</i>		
	1pm - 3pm		RESP Sales Training: Refreshment Training of Selling KFF Flex First Plan and Approval Criteria <i>Brion Chhacchi</i>				