

Monthly Platform Events Schedule - FEBRUARY

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 events 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 the company.

Week	Time	Monday	Tuesday	Wednesday	Thursday		Friday	Saturday
1st	11am - 12:30pm						Harness the Power of Par Whole Life Cash Value <i>EL Monica Zhang</i>	Business Start-up Training #6: Phone Skills <i>Ryan Lee</i> <i>(10 - 11:30am, 3rd Floor)</i>
	2pm						1-on-1 Case Studies <i>EL Monica Zhang</i> <i>(1 - 3 pm)</i>	Don't Miss Your Self Employee Write Offs <i>Jacky Kuk</i> <i>(2 - 2:45pm, 3rd Floor)</i>
	4pm							
2nd	11am - 12:30pm				HLLQP Exam Preparation <i>Jack Cao</i>		Lunch & Learn: UL Insurance Basics <i>CL Carol Ng</i>	Business Start-up Training #7: Opening Skills <i>Ryan Lee</i> <i>(10 - 11:30am, 3rd Floor)</i>
	2pm		MDRT Training: Whole Person #2 * Age of Abundance * Are You Relevant * How MDRT Mentors Changed My Life * If you Cannot Stand up Stand out * Learning to Laugh Again * Personal Creativity and Innovation	1-on-1 Case Studies <i>RBC Mike Jackson</i>			1-on-1 Case Studies <i>CL Carol Ng</i> <i>(1 - 3 pm)</i>	
	4pm				Career Orientation			
3rd	11am - 12:30pm	New Member Training School #1 <i>Stephen Lai</i> <i>(10am - 1pm)</i>	New Member Training School #2 <i>Stephen Lai</i> <i>(10am - 1pm)</i>	Mandatory: Annual Compliance Update <i>Stephen Lai</i>	HLLQP Exam Preparation <i>Jack Cao</i> <i>(Lounge)</i>	New Member Training School #3 <i>Stephen Lai</i> <i>(10am - 1pm)</i>	Doing Business with Non-Residents <i>AL Julius Ho</i>	Business Start-up Training #8: Fact Finding Skills <i>Ryan Lee</i> <i>(10 - 11:30am, 3rd Floor)</i>
	2pm		MDRT Training: Marketing #2 * 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>				Secret Tax <i>William Liu</i> <i>(2 - 3pm, 3rd Floor)</i>
	4pm							

4th	11am - 12:30pm		New Member Training School #4 <i>Stephen Lai (10am - 1pm)</i>	Case Study and Share #2 <i>Carmen Ke</i>	HLLQP Exam Preparation Jack Cao <i>(Lounge)</i>	New Member Training School #5 <i>Stephen Lai (10am - 1pm)</i>	How Manulife New Par Fits Your Sales Concepts <i>ML Chris Chang</i>	Business Start-up Training #9: Closing Skills <i>Ryan Lee (10 - 11:30am, 3rd Floor)</i>
	2pm		MDRT Training: Selling #2 * Do not Keep Me a Secret * Opportunity Value of Cash * The Unseen Dynamics Powering China The Developing World and Driving Globalization * True Success * Enjoy the Ride * What Makes the Great Ones Great	1-on-1 Case Studies <i>AL Julius Ho</i>			RESP Exam Preparation <i>Jennifer Chan</i>	
	4pm				Career Orientation			
5th	11am - 12:30pm	New Member Training School #6 <i>Stephen Lai (10am - 1pm)</i>		Better than RRSP Tax Efficient Investment Vehicle??? <i>Simon Mok</i>	HLLQP Exam Preparation Jack Cao <i>(Lounge)</i>	RESP Monthly Training: Review KFF Compliance for Approval New Business and E-App for Flex First Plan <i>Jennifer Chan</i>		
	2pm		MDRT Training: Advising Clients #2 * This is the Moment * The Value of MDRT * The 5 keys to Ultimate Health * The Champion Code * The Power of Optimism	1-on-1 Case Studies <i>Simon Mok</i>				
	4pm							