

Monthly Platform Events Schedule - July

- Meanings of Color
- Platform Events
 - Carriers' Training
 - Events for Members' Guests
 - 1-on-1 Case Studies

Reservation: RSVP is required to the Google calendar of admin@wayfinancial.ca and events take place in 2nd Floor Boardroom unless otherwise specified.
Remarks: The strategies and opinions presented by speakers are in their personal capacity and do not reflect the views of the company.

Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1st	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Goal Setting (Mandarin) <i>William Liu</i>	Business Start-up Training #2: Prospecting Skills <i>Ryan Lee</i> (10 - 11:30am, 3rd Floor)	Changes on Equimax Wealth Accumulator <i>EL Monica Zhang</i>	
					Business Start-up Coaching <i>William Liu</i> (11:30am - 12:30 pm, 3rd Floor)		
	2pm		MDRT Training: Whole Person #11 * Age of Abundance * Are You Relevant	1-on-1 Case Studies <i>RBC Mike Jackson</i> (2-4 pm)		1-on-1 Case Studies <i>EL Monica Zhang</i> (1 - 3 pm)	
	4pm		* How MDRT Mentors Changed My Life * If you Cannot Stand up Stand out * Learning to Laugh Again * Personal Creativity and Innovation				
2nd	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Case Studies <i>Carmen Ke</i>	Business Start-up Training #3: Phone Skills <i>Ryan Lee</i> (10 - 11:30am, 3rd Floor)	Lunch & Learn: Canada Life's Simple Protect – fast, simple and user-friendly <i>CL Carol Ng</i>	
					Business Start-up Coaching <i>William Liu</i> (11:30am - 12:30 pm, 3rd Floor)		

	2pm		MDRT Training: Whole Person #12 * 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>AL Julius Ho</i> <i>(2-4pm)</i>	1-on-1 Case Studies <i>Simon Mok</i> <i>(2-4pm, Simon's office)</i>		1-on-1 Case Studies <i>CL Carol Ng</i> <i>(1 - 3 pm)</i>	7 Tips that your Executor Doesn't Know 你的遺產執行人不可不知道的7個秘訣 <i>(1:45pm-3:45 pm)</i>
	4pm							
3rd	9:30am-11am						HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Business Knowledge & Processing <i>Stephen Lai</i>	Business Start-up Training #4: Opening Skills <i>Ryan Lee</i> <i>(10 - 11:30am, 3rd Floor)</i>	The Merits of Segregated Funds and how they can provide Long Term Benefits <i>RBC Mike Jackson</i>		
					Business Start-up Coaching <i>William Liu</i> <i>(11:30am - 12:30 pm, 3rd Floor)</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 ML Chris Chang (2-4pm)				
	4pm				Career Orientation			
	9:30am-11am						HLLQP Exam Preparation <i>Jack Cao</i>	
	10am - 11 am			1-on-1 Case Studies <i>Simon Mok</i> <i>(10-11am, Simon's office)</i>	Business Start-up Training #4: Fact Finding Skills <i>Ryan Lee</i> <i>(10 - 11:30am, 3rd Floor)</i>			

4th	11am - 12:30pm			Actual role play of Asset Creation Plan(ACP) for prospecting and 1st appointment <i>Simon Mok</i>		Business Start-up Coaching <i>William Liu</i> (11:30am - 12:30 pm, 3rd Floor)	Mid-Year Market Update <i>CL Investment Tajammul Pannun</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>Simon Mok</i> (2-4pm, Simon's Office)	1-on-1 Case Studies <i>GWL Jason Yang</i> (2-4pm)			
	4pm							
5th	11am - 12:30pm					Business Start-up Training #5: Closing Skills <i>Ryan Lee</i> (10 - 11:30am, 3rd Floor)		
						Business Start-up Coaching <i>William Liu</i> (11:30am - 12:30 pm, 3rd Floor)		
	2pm		MDRT Training: Advising Clients #3 * This is the Moment * The Value of MDRT * The 5 keys to Ultimate Health * The Champion Code * The Power of Optimism					
	4pm							