

Monthly Platform Events Schedule - September

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
Remarks: The strategies and opinions presented by speakers are in their personal capacity and do not reflect the views of

Week	Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1st	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Better Quotation Concept <i>Tim Lau</i>		What is Manulife Investment all about: fund selections, plan features and more <i>ML Ivan</i>	
	2pm		MDRT Training: Whole Person #9 * 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 (2-4 pm, Lounge)</i>			
	4pm						
2nd	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Case Studies <i>Carmen Ke</i>		Lunch & Learn: Maximize your Estate with Insurance Planning A strategy on how to cascade your clients wealth through multiple generations <i>CL Carol Ng</i>	
	2pm		MDRT Training: Whole Person #9 * 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>Simon Mok</i>		1-on-1 Case Studies <i>CL Carol Ng</i>	
	4pm				#2. 12 Tactics your Executor Should Learn (1:15pm-3:45pm)		

3rd	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Business Knowledge & Processing <i>Stephen Lai</i>		Using Segfunds as a lifeboat in choppy waters <i>RBC Mathew To</i>	
	2pm		MDRT Training: Marketing #9 * 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, Lounge)			
	4pm				Career Orientation		
4th	9:30am-11am					HLLQP Exam Preparation <i>Jack Cao</i>	
	10am - 11 am			1-on-1 Case Studies <i>Simon Mok</i> (10-11am)			
	11am - 12:30pm			Level up Closing appointment of Actual role play of Asset Creation Plan(ACP) <i>Simon Mok</i>		Stand out from the crowd, can PAR 90 be a better solution? <i>ML Chris Chang</i>	
	2pm		MDRT Training: Selling #9 * 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 GWL Jason Yang (2-4pm)		#2. 12 Tactics your Executor Should Learn (1:15pm-3:45pm)
	4pm						