

Monthly Platform Events Schedule - January

Meanings of Color

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

Remarks:

RSVP to the Google calendar of admin@wayfinancial.ca. Events take place in Way Boardroom unless otherwise specified.
Strategies and opinions presented by speakers are in their personal capacity and do not reflect the views of the Platform.

				Jan 1		Jan 2		Jan 3		Jan 4
Week	Time	Monday	Tuesday	Wednesday		Thursday		Friday		Saturday
1st	9:30am-10am			New Year (Office Closed)				HLLQP Exam Preparation Jack Cao		
	11am - 12:30pm						How to use Equitable Life to capture more market share EQ Monica Zhang			
	2pm						1-on-1 Case Studies EQ Monica Zhang (1 - 3 pm)			
		Jan 6	Jan 7	Jan 8		Jan 9		Jan 10		Jan 11
Week	Time	Monday	Tuesday	Wednesday		Thursday		Friday		Saturday
2nd	9:30am-10am							HLLQP Exam Preparation Jack Cao		
	11am - 12:30pm			Estate Planning: who in the family is involved and their objections – spouse, children, parents? Carmen Ke				The year's outlook and top funds for the RRSP season ML Stefan Goddard	The 3 types and 11 ways of Comprehensive Property Tax Program Planning 1:45 - 4pm	
	2pm			1-on-1 Case Studies Simon Mok (Simon's Office)				1-on-1 Case Studies ML Stefan Goddard (1 - 3 pm)		
		Jan 13	Jan 14	Jan 15		Jan 16		Jan 17		Jan 18
3rd	9:30am-11am							HLLQP Exam Preparation Jack Cao		
	11am - 12:30pm							The PAC concept, benefits to clients and advisors (including Way's \$2,000 PAC campaign) RBC Mike Jackson	The 3 types and 11 ways of Comprehensive Property Tax Program Planning 1:45 - 4pm	
	2pm									

		Jan 20	Jan 21	Jan 22		Jan 23	Jan 24	Jan 25
4th	9:30am-11am			1-on-1 Case Studies <i>Simon Mok (10 - 11am)</i>			HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm			Level-Up Closing appointment of RRSP Meltdown (RPMD) <i>Simon Mok</i>			Lunch & Learn: RRSP strategies and benefits of using the newly revamped Canada Life Fund Shelf <i>CL Taj Pannum</i>	
	2pm			1-on-1 Case Studies <i>Simon Mok (Simon's Office)</i>	1-on-1 Case Studies <i>GWL Jason Yang (Lounge)</i>	3 common mistakes and 9 rare solutions of RRSP <i>1:45 - 4pm</i>		
		Jan 27	Jan 28	Jan 29		Jan 30	Jan 31	
5th	9:30am-11am		RESP Training <i>Brion Chhachhi (10:30am - 12pm, Prominence Office)</i>				HLLQP Exam Preparation <i>Jack Cao</i>	
	11am - 12:30pm						How to do PACs efficiently using WealthLink and opportunities from RRSP loans <i>RBC Mike Jackson & B2B Ash Kotodia</i>	