

We are  
Advocis Toronto.

And we'd love to  
partner with you.

2020 Sponsorship Opportunity.



# We're an event-driven organization...



# providing value to our members...

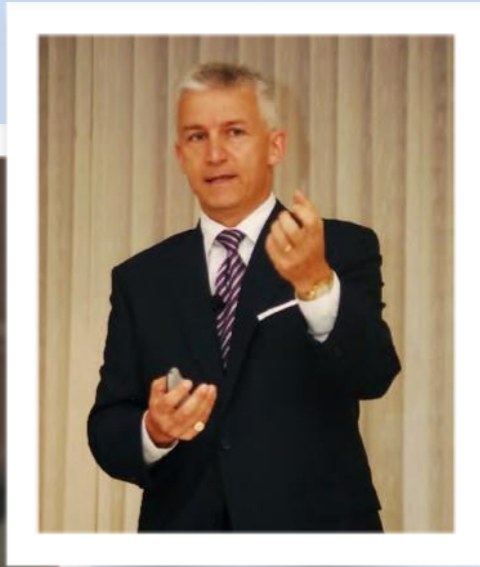


# and our valued sponsors...



Advocis  
TORONTO

# And we always have been.



# Thank-you to our 2019 Sponsors!



# What is Advocis?

The Financial Advisors Association of Canada



We are the oldest and largest voluntary membership organization of financial advisors and planners in Canada. We have more than **11,000** advisors and planners in **40 chapters across Canada**, Advocis members provide financial advice, product service and employee benefit planning to **millions of Canadians** in a number of financial areas from insurance to investments to securities.

**Advocis**   
TORONTO

# What is Advocis Toronto?

Advocis Toronto Chapter



## Canada's Largest Chapter

Over 1,500 Members

Advocis Toronto is the largest of Advocis' 40 chapters across the country with approximately 1,500 members in the GTA and surrounding communities.

Advocis Toronto is led by a volunteer board of directors made up of members within the chapter who have committed time to ensure that our members have the opportunity to network, receive valuable continuing education credits and hear leading technical and motivational experts in a variety of programs offered by the chapter.

For over 100 years, Advocis has been committed to providing advisors with a respected professional community which includes access to education, tools and resources to help them to maintain a competitive position in the financial services industry.

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# Membership has its privileges.

Some of the reasons to participate in our events



## Network

Rub shoulders with likeminded individuals over great food immersed in engaging subject matter



## Absorb

The finest in the financial advice and planning community deliver outstanding and relevant content with the purpose of bettering your practice.



## Value

Our Chapter is constantly seeking ways to provide you added value just for participating.

# Big Ideas. Great Conversations.

We'll continue to be an event-driven organization in 2020.

# UNDER 5 AFTER 5

EVENT

Advocis™ Toronto

## THE UNDER 5 SURVIVAL GUIDE

WEDNESDAY, FEBRUARY 13<sup>TH</sup>, 2019

5:00PM - 7:00PM

SPEAKER:

**JOHN  
LYSACK**

**LOCATION:**

THE PILOT  
STEALTH LOUNGE  
22 CUMBERLAND ST.,  
TORONTO, M4W 1J5





International  
Women's Day

## ADVOCIS TORONTO'S INTERNATIONAL WOMEN'S DAY BREAKFAST 2019

THURSDAY, MARCH 7<sup>TH</sup>, 2019



PLEASE JOIN US FOR A MORNING OF  
EDUCATION, NETWORKING, DOOR PRIZES  
AND A FEW SURPRISES, AS WE CELEBRATE  
INTERNATIONAL WOMEN'S DAY.



**ELKE  
RUBACH**

LLB, LLM, CLU,  
PRINCIPAL RUBACH WEALTH



**SAMARA  
CHARTERS**

SENIOR BUSINESS DEVELOPMENT  
MANAGER, SUN LIFE FINANCIAL

### **LOCATION:**

RICHMOND HILL COUNTRY CLUB  
8905 BATHURST STREET

### **AGENDA:**

**7:30** BREAKFAST

**8:00** OPENING REMARKS

**8:15** ELKE RUBACH

- WOMEN: HAVE YOU THOUGHT  
ABOUT YOUR LEGACY

**9:15** COFFEE AND NETWORKING

**9:45** SURPRISE GUEST

**10:00** SAMARA CHARTERS

- ENGAGING THE FEMALE MARKET

**11:15** CLOSE

PRESENTED BY



**2 C.E. CREDITS** WILL BE AWARDED FOR THIS EVENT

# ANNUAL MEETING AND ETHICS COURSE

COMPLIANCE 101

## SPEAKERS:



**ADRIAN  
ALTAMIRANO**

CIM®, CFP®, FCSI®  
ASSISTANT VICE-PRESIDENT,  
SALES - ONTARIO



**ROBERT  
AGGIO**

CLU, CHFC  
VICE-PRESIDENT,  
SALES - ONTARIO

**THURSDAY  
MAY 2<sup>ND</sup>, 2019**

**8:00 AM - 10:30AM**

**RICHMOND HILL COUNTRY CLUB  
8905 BATHURST STREET  
RICHMOND HILL, ONTARIO**



# THE CRAZY WORLD OF TAX AND ESTATE PLANNING



## GLENN STEPHENS

LLB, TEP, FEA

AUTHOR OF THE BOOK

**ESTATE PLANNING WITH  
LIFE INSURANCE, 6<sup>TH</sup> EDITION**

## KEVIN WARK

LL.B, CLU, TEP

AUTHOR OF

**THE ESSENTIAL CANADIAN GUIDE TO  
ESTATE PLANNING, 2<sup>ND</sup> EDITION** AS WELL AS  
**THE ESSENTIAL CANADIAN GUIDE TO INCOME SPLITTING**



Advocis® TORONTO

**THURSDAY JUNE 20<sup>TH</sup>, 2019**

**10:00 AM - 3:00 PM**

**ESTATES OF SUNNYBROOK**  
2075 BAYVIEW AVE, TORONTO, ON M4N 3M5

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# ADVISOR TOOLBOX SERIES

SEPTEMBER 26

Breakfast and Registration at 7:30am | Event starts at 8:00am

**RICHMOND HILL COUNTRY CLUB** 8905 Bathurst St, Richmond Hill, ON L4C 0H4

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## SPEAKERS



**April-Lynn Levitt, B.Comm, CFP**

Coach The Personal Coach - Customized  
One-on-One Business Coaching for  
Financial Advisors

***BUILD YOUR VALUE,  
BUILD YOUR BUSINESS***



**Wendy Brookhouse**

Founder of Black Star Wealth

***FUTURE READY ADVISOR:  
5 STEPS TO LEVERAGE  
TECH TO INCREASE  
YOUR PRODUCTIVITY  
AND SAVE MONEY***

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**4<sup>TH</sup> ANNUAL**

# **ADVOCIS TORONTO ADVANCED LEARNING SERIES**

**THURS, OCT 17TH 2019, 8AM - 5PM**

**SPONSORED BY**



**Catherine MacRae, CLU, CFP,**  
**Working with Older Clients:**  
**Why Product Design and Selection Matter**

**Edgar-Andre Montigny, Ph.D, J.D.**  
**Montigny Law**  
**Making Your Practice Accessible**

**Barbara Stewart, CFA**  
**Suddenly Single with Lessons**  
**from Rich Thinking™**

**Keith Leech, CFP, CLU, Ch.F.C., CHS**  
**Context Planning Ltd.**  
**Delivering Your Message**  
**– A Focus on Older Clients**

**Risa Awerbuck, LL.B.,**  
**Partner, Torkin Manes LLP**

**Older Clients and Incapacity Issues: An Advisor's Toolbox**

**Elizabeth Hoyle,**  
**Consultant, Bridgehouse Asset Managers**  
**Mental Health & the Financial Advice Relationship**

**Elke Rubach, LL.B LL.M CLU**  
**Principal, Rubach Wealth**  
**Meaningful Wealth Transitions**  
**– A Multi-Disciplinary Approach**

**Craig Vander Zee, LL.B., TEP,**  
**Partner, Torkin Manes LLP**

**SILVER INTO GOLD: WORKING WITH OLDER CLIENTS**

**THE OLD MILL 21 OLD MILL ROAD, TORONTO, ON M8X 1G5**

**U5A5 EVENT**



## **PART 2: LINKEDIN AND BOOSTING YOUR VISIBILITY**

Date: November 13th, 2019 | Time: 5:00 PM - 7:00 PM

Where: The Pilot, Stealth Lounge - 22 Cumberland St.

**Speaker: Shelly Elsliger**

Career Specialist, Global LinkedIn Trainer,  
Empowerment and Confidence Coach,  
Linked-Express / University of Toronto

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# Sponsorship

# Platinum Sponsorship

\$10,000

## **Exclusive recognition as a TORONTO PLATINUM SPONSOR (1 available)**

- Introduction and recognition at all Chapter events
- Platinum placement on Chapter Sponsor Recognition Board at each Chapter event
- 1 table of 6 at the Advocis Holiday Breakfast in December
- Provide 2-3 minute briefing at each of:
  - 3 Breakfast Meetings, 1 Chapter Social Event, 3 Under 5 After 5 events, 1 Institute PDDay & 1 Holiday Luncheon Event
- Your company booth at all events
- Provide a feature article on LinkedIn
- 1-2 Webinars hosted via Advocis Toronto
- Recognition on Advocis Toronto website for 1 year with corporate profile and link to corporate website
- 4 complimentary registrations for all Advocis Toronto chapter event, excluding Update 2020
- Up to two (2) marketing pieces available for hand-out to delegates at one event

# Gold Sponsorship

\$5,000

## **Recognition as a TORONTO GOLD SPONSOR (3 Available)**

- Introduction and recognition at Chapter events
- Gold placement on Chapter Sponsor Recognition Board at each Chapter event
- 1 table of 6 at the Advocis Holiday Recognition Breakfast in December
- Provide 2-3 minute briefing at all meetings and/or chapter socials
- Up to two (2) marketing pieces available for hand-out to delegates at one event
- Provide a feature article on LinkedIn
- Recognition on Advocis Toronto website for 1 year with corporate profile and link to corporate website
- 2 complimentary registration for all Advocis Toronto advisor events excluding 2020 Update Sessions.
- Booth at 2 events of your choice.

# Silver Sponsorship

\$3,000

## **Recognition as a TORONTO SILVER SPONSOR (5 Available)**

- Sponsorship recognition at all Chapter events
- Silver placement on Chapter Sponsor Recognition Board at each Chapter event
- Recognition on Toronto chapter's website for 1 year with corporate profile and link to corporate website
- 1 complimentary registration for all Advocis Toronto advisor events
- Company Booth at one Advocis Toronto event

# Chapter Sponsorship

\$1,000

**A chapter partnership provides an excellent opportunity to network with members (unlimited number available)**

- Chapter placement on Chapter Sponsor Recognition Board at each Chapter event
- Recognition on Toronto chapter's website for 1 year with corporate profile and link to corporate website
- 1 complimentary registration for all Advocis Toronto advisor events excluding 2020 Update Sessions

# Events in 2020

- **Thursday, January 23<sup>rd</sup>, 2020** – Advanced Taxation with Jamie Golombek – Richmond Hill Country Club (RHCC)
- **Thursday, March 5<sup>th</sup>, 2020** – International Women's Day Event – Location TBD
- **Early/Mid April, 2020** – Advanced Underwriting with Karen Cutler/Helen Chatelain – RHCC
- **Thursday, May 7<sup>th</sup>, 2020** – Annual Meeting & Ethics CE – RHCC
- **Thursday, May 14<sup>th</sup>, 2020** – Update 2019 – RHCC
- ➤ **Thursday, June 18<sup>th</sup>, 2020** – Legal Series: Corporate Insurance with Kit Bennett & Glen Stephens – RHCC
- **Thursday, September 24<sup>th</sup>, 2020** – Advisor Toolbox Series – RHCC
- **Wednesday, October 21<sup>st</sup> and Thursday, October 22<sup>nd</sup>, 2020** – PD Day & Pre-Gala – The Old Mill
- **Wednesday, Nov. 11<sup>th</sup>, 2020** – Decumulation Strategies with Daryl Diamond – RHCC
- **Thursday, December 10<sup>th</sup>, 2020** – Holiday Recognition Breakfast – RHCC

# Thank you.

Any questions?

Please contact Michael Camacho at:

416-367-1427

[mcamacho@csibrokers.com](mailto:mcamacho@csibrokers.com)