2017 Business Advisors Virtual Conference

November 21, 23, 28, 30, 2017

ReFreshed, ReTooled and Ready for Business.

The ideal time to reflect on the year past and re-group for the year ahead. Your 2017 Virtual Conference is about re-harnessing energy and focus; honing prospecting and negotiating skills; fine-tuning how you juggle your job; upskilling for conversations that can deepen business relationships. Feeling retooled and ready, bring on 2018!

Register for the bundle by November 16!

CCUA
Canadian Credit Union Association

cusource
Professional Development and Education

WEBINAR DESCRIPTIONS

Breaking Busy. Resilient Living in Crazy Times

SESSION #1

NOVEMBER 21, 2017
1:00 - 2:30 PM ET

REGISTER NOW

Looking for an energy boost? You've just found it! Join Linda for a hands-on, highly humorous ride that will re-focus, re-energize and re-invent how you see your life and your work. Her straight-shooting approach is packed with relevant, easy solutions that will enable you to take back your work day and personal life.

What can you expect from this session?

1. Change. What's really getting in the way of your moving forward? Change Readiness has never been this painless!
2. Declutter. Stop sabotaging your efforts and success! Create spaces to Just Be - Inspired.
3. Re-Energize: Tools to re-energize and re-engage.
4. Clarity. Get down to what you really want and become more accountable.
5. Resiliency. The essentials needed to show up ready to set the world on fire.

Come to reflect on what has been and what could be. Prepare to make 2018 a "new" year!

Identifying and Engaging High-Value Prospects

SESSION #2

NOVEMBER 23, 2017
1:00 - 2:30 PM ET

REGISTER NOW

Re-focused and energized, you're ready to take on the world, including finding and engaging high-value prospects. For some, prospecting generates a real buzz; for others, it's daunting work. Thus, we either procrastinate about this key growth activity or classify it under "don't have time." Lean in as together, you and Dave gear up for prospecting success in 2018.

Dave will share strategies, tips and tools for:

- maximizing your 1880 revenue-generating hours
- leveraging, tracking and monitoring your key influencer relationships
- prospecting conversations that uncover then connect the value business owners want with the value you can bring
- follow-up strategies to bring "prospect business" home!

Register for this session, but come prepared to participate!

WEBINAR DESCRIPTIONS

Juggling the Job: Growth, Credit Quality and Monitoring

SESSION #3

NOVEMBER 28, 2017
1:00 - 2:30 PM ET

REGISTER NOW

Juggling the demands of business development and monitoring can be challenging. In fact, it's often seen as a trade-off. But growing and managing your portfolio doesn't have to be mutually exclusive. Kristi Miller shares her approach to creating time for the key functions of growth while maintaining credit quality and audit requirements.

Kristi will also share tips on how to:

- Build and manage an effective sales pipeline document
- Discover, and uncover, member needs
- Use compliance as a sales tool
- Apply capacity management tools and best practices

Leave this session feeling confident that you can make time for sales activities without compromising administration.

Working with Executors for Successful Succession Planning

SESSION #4

NOVEMBER 30, 2017
1:00 - 2:30 PM ET

REGISTER NOW

The numbers are shocking. In a Canadian Federation of Independent Business survey, 77% of business owners said they planned to exit the business within the next ten years, yet only 9% had a formal succession strategy. Further, it's estimated that 70% of Canadians don't have a current and valid will!

For business owners, new estate legislation can make matters far more challenging, as they frequently have multiple estates, yet only one Graduated Rate Estate (GRE). The implications for Canadian businesses are as significant as the opportunities for those – like you -- who work with them.

During this session, Mark will:

- highlight the problems that can arise without proper planning
- share an analysis of what business owners are thinking about their succession planning
- provide tips on how to start the conversations that no one else is having
- use case studies to identify business opportunities and your role, as business advisor, in them
- highlight a certification program that can significantly enhance your relationship-growing capacity and "outstanding service" value.

By learning more about the complex role of the executor, you'll start succession conversations you've never had before and develop deep relationships that serve business owners well now and in the future.

SPEAKER PROFILES

LINDA EDGECOMBE CSP, HALL OF FAME SPEAKER

My Promise is simple: to deliver programs that Create Powerful Shifts, Inspired, Energized and Accountable Professionals who show up everyday ready to, as my mom used to say, "set the world on fire". Oh and I promise it will be a heck of a good time. Maybe the best laugh they will have had in a long time. I believe a laugh is worth more than a thousand words and it has the power to change the way people feel, think and take action!

"A Day without laughing is a day wasted!" As an award winning Celebrity Humorist Speaker, Trainer and Consultant. For the past 24 years, Linda's footprint is seen and experienced around the world. Her mission is to get people Fired up and Ready to Shift or Get off the Pot!

The Top 60 Motivational Speakers in the World includes Linda Edgecombe.

Her non-BS approach is refreshing, engaging and relevant. Linda's latest book and Ted Talk "Breaking Busy – Finding Peace in the Chaos" is a game changer for those who want to step off the treadmill. Change has never been this painless! She energizes every room as she leads people to loosen up, lighten the load and laugh. Linda has been featured in the Wall Street Journal as an expert in "Shifting Perspectives". Her messages are as welcome as a deep belly laugh and as profound as an honest look in the mirror.

SPEAKER PROFILES

DAVE HOLT, CSP - FACILITATOR AND SALES PERFORMANCE COACH

Dave Holt has spent 22 years working in the training and development field. In that time he has experienced many roles, which have included sales, sales management, sales coaching, consulting and facilitation. He is a lead Facilitator for the Canadian Professional Sales Association. Dave's client list spans all major industry segments including finance, manufacturing, telecommunications, consulting, specialty services and package goods.

He has expert skills in customer relations, sales development, sales leadership development, and team building and presentation skills.

Dave has delivered learning programs internationally in a variety of ways including, live satellite broadcasts to a national audience, large sales conferences and traditional classroom and workshop environments. His workshops are fast-paced, interactive and practical. He ensures that everyone learns something about themselves as they increase their knowledge of a specific topic and delivers in a very entertaining manner which enhances the learning and the fun.

Dave has designed and conducted workshops and seminars on a variety of topics, such as Sales, Sales Coaching, Effective Presentations, Communications, Change Management and Team Building.

Dave has coached sales professionals, sales managers and senior management on major sales initiatives and presentation topics.

What is Dave's perspective on sales development?

Organizations need to continually invest in improving the performance of their people. Sales and service people need to take responsibility for continuously learning and becoming the best they can be for their customer's. Great sales leadership becomes the foundation for success.

SPEAKER PROFILES

KRISTI MILLER, NATIONAL MANAGING DIRECTOR
FIRST WEST CAPITAL

Kristi has been providing mid-market businesses with relationship-focused, strategic financing for over twenty years. As National Managing Director, Kristi leads First West Capital across Canada and delivers tailored subordinated-debt, mezzanine and equity financing solutions for growth, acquisitions and transitions.

Prior to First West Capital, Kristi spent ten years with Vancity Capital, another B.C.-based subordinated debt fund. She has also worked with the Canadian Imperial Bank of Commerce and the Small Enterprise Equity Fund of the European Bank for Reconstruction and Development.

Kristi holds a Master of Business Administration in International Business from the University of British Columbia and a Bachelor of Arts (Joint Honours) in History and Russian Studies from McGill University.

Kristi currently chairs the board of Junior Achievement of B.C. and acts as an advisor to the Fulmer Foundation. Previously, she has served as vice-chair of the Vancouver International Marathon Society, is past president of the AWF Association of Women in Finance and former chair of the B.C. Provincial Child Care Council. In 2015, Kristi was nominated for a YWCA Woman of Distinction Award in the category of Business and the Professionals, and is the recipient of the 2017 CVCA Ted Anderson Community Leadership Award.

MARK O'FARRELL, BA | CFP | CLU | CHFC | TEP | CEA

Mark is president of the Canadian Institute of Certified Executor Advisors. He's a Chartered Financial Consultant, registered Trust and Estates Practitioner and Certified Executor Advisor. He is also a member of Advocis, the Conference for Advanced Life Underwriting (CALU) and the Canadian Association of Gift Planners (CAGP).

He has given hundreds of seminars across Canada, to the public, professional groups, Canadian businesses, industry symposia, and aboard continuing education cruise ships around the world. He has been speaking about the important role of executors and on estate tax strategies for more than 20 years.

REGISTRATION & PRICING

Conference Bundle

Purchase a single seat in all 4 sessions. (Non-transferable, single employee only)

- **Corporate Members - $389 (per employee)**
- **Pay As You Go - $467 (per employee)**

REGISTER NOW FOR BUNDLES

Individual Webinars

Attend as many webinars as you'd like and register for each separately. Use the "register now" links on page 2 or search by title in the Learning Gateway to register.

- **Corporate Members - $109 (per webinar)**
- **Pay As You Go - $130 (per webinar)**

REGISTER NOW

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For more information or registration assistance, contact Client Solutions:
ccua.com/cusource | 1.888.367.1386 | clientsolutions@ccua.com