2017 PERSONAL ADVISORS VIRTUAL CONFERENCE

May 16, 18, 23, 25, 2017

Re-Energize. Re-Focus.
Then Grow Business Strategically.

Register by May 11th, 2017 for the bundle

CCUA
Canadian Credit Union Association

cuSource
Professional Development and Education

WEBINAR DESCRIPTIONS

Breaking Busy. Resilient Living in Crazy Times

SESSION #1

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 "No BS", straight-shooting approach is packed with relevant, easy solutions to take back your work day and your personal life again.

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.
6. **Laughter.** This session may be the best laugh you have had in a long time.

Join us!

MAY 16, 2017
1:00 - 2:30 PM ET

REGISTRATION DEADLINE:
MAY 11, 2017

REGISTER NOW

Networking: From Contact to Trusted Relationship

SESSION #2

Refreshed and re-focused, you're ready to take on the world; to bring in new business. Then, in your email, an invitation
to a networking event. Perfect. So why are you hesitating?

For many, networking is standing on the periphery of a crowd of people thinking, "What now?" That's one aspect of networking, but networking is more. It's an essential skill for building high-trust relationships with current and potential members and the broader community.

Some people are natural networkers. They have a knack for connecting with people – both face-to-face and on social media – then turning that contact into
a trusted relationship. If that's you, are you maximizing your skills? If that's not you,
there's good news! It can be.

Join experts Judy and Gayle as they share their tactical and practical tips for Positive Networking®. You'll learn:

- How to network with confidence, even if you are an introvert!
- How to "work a room"
- 3 Quick Wins to manage your networking time
- How to move your relationship forward to one of trusted advisor.

Plan. Connect. Build the relationship. See the results. Feel the energy!

MAY 18, 2017
1:00 - 2:30 PM ET

REGISTRATION DEADLINE:
MAY 15, 2017

REGISTER NOW

Engaging Executors:

Powerful Allies in Estate Lending Opportunities

SESSION #3

Estimates are that 70% of Canadians don't have a current will. Further, 43% say they haven't given "any thought" to their estates. The potential result: executors facing nightmare situations with one of their greatest challenges – liquidity!

You are in the ideal space to intervene if you know how to engage with those who have vested legal and moral responsibilities for successful estate settlement – estate executors.

In this session you'll learn:

- about the overwhelming problems that can arise without proper planning and the remarkable outcomes that can arise with proper planning
- how to start the conversation that no one is having by engaging with executors, the most trusted and influential people in testators' lives
- through mini-case studies, about the opportunities you have for building key relationships and business.

Following this session, you'll be looking for situations to engage in profound and meaningful ways, driving business opportunities while helping members' families. Join us. Then, engage!

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

REGISTRATION DEADLINE:
MAY 18, 2017

REGISTER NOW

Coaching & Counselling:

Positioning Members for Financial Success

SESSION #4

What a day! Another member who is spending more than they're making. Another consolidation. Another couple in their 60's remortgaging their home. How do you reverse these trends so your members can realize their financial goals? What can you do? Say? Is it your role to get that involved?

Yes! And you do it for yourself, your credit union, but primarily, for your member. In this session, you will learn how to effectively coach and counsel members – to become a true partner in their financial success. The result will be a deep and lasting relationship.

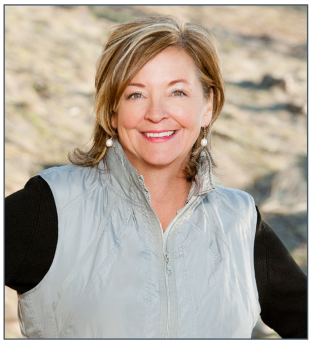
Such intervention can mean some tough conversations but continually enabling poor financial habits will cause long term challenges for your member, you and the credit union. Join us in learning practical approaches to turning difficult situations into opportunities for celebration. That's a re-focused, re-energized, resilient member and you!

MAY 25, 2017
1:00 - 2:30 PM ET

REGISTRATION DEADLINE:
MAY 22, 2017

REGISTER NOW

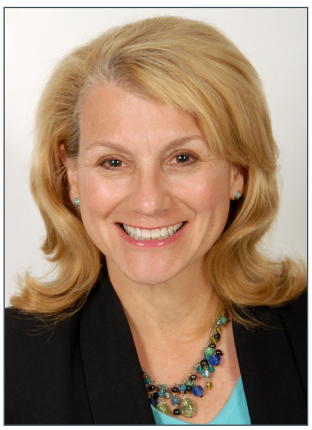
SPEAKER PROFILES



LINDA EDGECOMBE

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.



JUDY THOMSON

Judy Thomson is a chartered accountant, business consultant, and speaker who has held executive positions in human resources and administration with global companies in Canada and Asia. She was also part of the start-up management team of the world-famous Rocky Mountaineer Railtours. In addition to her role as chief operating officer of Shepa Learning Company, Judy is an Emeritus Member of The Vancouver Board of Trade's Women's Leadership Circle® advisory council (after serving six years as vice-chair), is a director of the BC Women's Enterprise Centre and a corporate director of a publicly traded mining exploration company.

GAYLE HALLIGREN-REZAC

Gayle Hallgren-Rezac is a writer, speaker, entrepreneur (founder, Cookies by George), and a YWCA Woman of Distinction. Gayle has spent more than two decades observing and writing on networking around the world. She is a member of the Davos Circle, having attended the Annual World Economic Forum over 11 times. She is also an expert on the "art of conversation", a subject she writes and speaks on frequently. Gayle is Chief Engagement Officer of Shepa Learning Company.

MARK O'FARRELL

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.

JOHN FERGUSON

John spent over 30 years working in the financial services industry retiring in early 2006. Throughout those years he served in many capacities – loans & mortgages, small business lending, private banking, international, business development, training and 10 years as an Area Manager overseeing retail banking operations. He has also been teaching part-time at the local College since 2001 delivering management and finance courses. He recently completed a contract for one year at a credit union. He also does a little consulting work with emphasis on strategic planning/visioning and change management.

Born in New Brunswick, he accepted employment in Ontario at 23 years of age and has lived in many locations across Ontario as he advanced his career. He and his family also had the opportunity to live in the Caribbean for 4 years where served as a bank manager. He and his wife Debbie have chosen to make Kingsville, Ontario (on the shores of Lake Erie) their retirement home.

John's education includes an undergraduate degree from St. Mary's University in Halifax, N.S. He has Personal Financial Planning designation as well as the Canadian Securities course. At age 45 he returned to school part-time at the University of Windsor and obtained his MBA. He enjoys training and his greatest satisfaction comes from seeing others succeed.

REGISTRATION & PRICING

Conference Bundle

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

- **Corporate Members - $299 (per employee)**
- **Pay As You Go - $360 (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 - $89 (per webinar)**
- **Pay As You Go - $110 (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