Workshop Prices:
US$499 for CDFAs
US$599 for non-members

Hotel: Holiday Inn Toronto Yorkdale
3450 Dufferin St., Toronto M6A 2V1
Located at Dufferin and Highway 401, with easy access to downtown Toronto, Pearson Airport, and many major attractions. Quote "Catering" to get 5% off your room rate; to reserve a room, call ***1-888-HOLIDAY*** *or email* **CDN-Reservations2@ihg.com**.

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Cancellation Policy: Cancellations received up to 14 working days before the workshop are refundable, minus a $50 registration service charge. After that, cancellations are subject to the entire fee, which you may apply toward a future conference or workshop. Please note: if you don't cancel and don't attend, you are still responsible for payment. Substitutions may be made at any time. For more information regarding refund, complaint, and/or program cancellation policies, please contact our office at 1-800-875-1760.

Topics include:

- Working as the Financial Neutral
- Pension Valuations on Divorce
- Business Valuations & Unjust Enrichment
- Tax Traps and Tips
- Teamwork: Practice Building

Who should attend?

The level of this series is advanced; attendees will include CDFAs™, CAs, CGAs, CFPs®, financial professionals, and lawyers. Even if you have attended a prior Advanced Workshop, you won't want to miss this newest series.

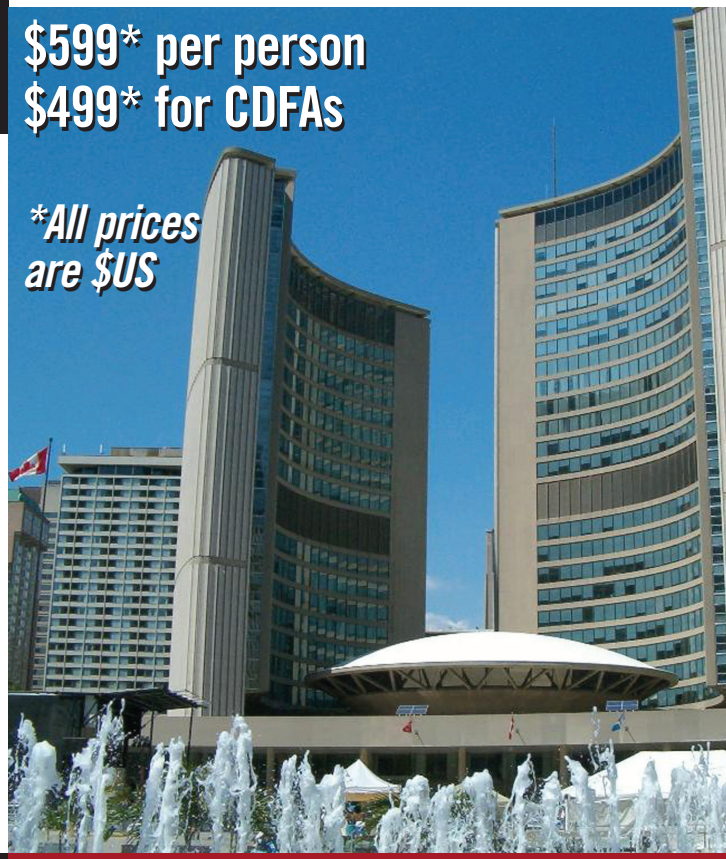
Receive up to 14 CE Credits for your CDFA™ and CFP® designations

Prerequisites

No advance preparation is required. In order to attend, you must currently be a CDFA™ member, CA, CGA, CFP®, financial professional, or a lawyer.

Toronto, ON May 6&7, 2011

Canadian Advanced Topics Workshop



Join us in Toronto on May 6 & 7 to acquire new skills and knowledge, network with your peers, and discover new opportunities in a tough market.

The Topics and Presenters

Business Valuations & Unjust Enrichment

When one or both parties in a matrimonial separation owns a business, shares of a company, etc., a business valuator must determine the value of the assets. This session will also introduce the doctrine of "Unjust Enrichment": an equitable concept created to remedy injustices that occur where one person makes a substantial contribution to the property of another person without compensation. ***Presenter:*** **Gordon Krofchick (CA, CBV)**.

Money, Emotions, and Divorce

One of the most challenging aspects of any divorce is money – especially since many of your clients' financial decisions are illogical, emotional, and reactive. Learn how to identify when emotions rather than logic are creating an impasse, as well as tips and techniques to help your clients make better financial decisions during divorce. ***Presenter:*** **Carolyn Ellis (Certified Master Integrative Coach, Spiritual Divorce Coach, MPP)**.

Pension Valuations on Divorce

A pension can be worth more than the matrimonial home, but the process of valuing a pension can be a difficult undertaking; two reasonable, qualified individuals may reach wildly different conclusions on the valuation of a particular pension. This session will provide an overview of the process – showing how the valuator arrives at the values shown in the final report, and what information the valuator needs to provide an accurate report. ***Presenter:*** **David Gershuni (F.C.I.A, F.S.A)**.

Raising the Bar: Working as the Financial Neutral in Divorce

This session will explain the pros and cons of the different methods available to divorcing couples (mediation, arbitration, collaborative divorce, and litigation), and explore opportunities available for working with couples as a financial neutral during the divorce process. Through a mixture of lecture and exercises, the presenters will demonstrate how working as a neutral differs from working as an advocate, discuss how to acquire the skills needed to make that shift, and how a CDFA can contribute as a valuable team member to help resolve the difficult financial issues faced by separating couples. ***Presenters:*** **Barbara Landau (Ph.D., LL.M., Cert. F. Med., Cert. F. Arb.) and Mary-Anne Popescu (B.A. Sc., Acc. Fm.).**

Tax Traps and Tips

In a divorce, all assets are *not* created equal. Unfortunately, most people – including lawyers – don't understand how taxes will impact the property received as part of a divorce settlement, leaving many clients holding the bag for the taxman. Understanding how taxes will affect the three main sources of money in divorce – child support, spousal support, and property division – will make you an invaluable resource for your divorcing clients. ***Presenter:*** **June Oliver (CGA, CFP®, CDFA™, FDS, EPC)**.

Teamwork: Building your Practice by Working as Part of a Team

This session will provide an introduction to working as the financial neutral as part of a "divorce team" in a Collaborative or Mediation setting. The presenter will discuss the pros and cons of the various models available to financial professionals, as well as the use of seminars and roundtables to grow your business. She will also share practice-building tips and insights from her own successful CDFA™ and Collaborative practices. ***Presenter:*** **Eva Sachs (CFP©, CDFA™, BCom)**.

The Schedule

Friday, May 6, 2010

8:00 a.m.–8:45 a.m. **Registration**

8:45 a.m.–12:00 p.m.

- **"Raising the Bar"**

10:45 a.m.–11:00 a.m. *Coffee/Tea Break*

12:01 p.m.–1:00 p.m. *Gourmet Lunch Buffet*

1:00 p.m.–3:00 p.m.

- **"Pension Valuations"**

3:00 p.m.–3:15 p.m.: *Coffee/Tea Break*

3:15 p.m.–5:15 p.m.

- **"Business Valuations"**

Saturday, May 7, 2010

8:45 a.m.–12:00 p.m.

- **"Tax Traps and Tips"**

10:30 a.m.–10:45 a.m. *Coffee/Tea Break*

12:00 p.m.–1:00 p.m. *Gourmet Lunch Buffet*

1:00 p.m.–3:00 p.m.

- **"Teamwork: Practice Building"**

3:00 p.m.–3:15 p.m. *Coffee/Tea Break*

3:15 p.m.–5:15 p.m.

- **"Money, Emotions, and Divorce"**

For more information, or to reserve your space in the Conference, please contact IDFA™ today.

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