

LIST OF PAST PRESENTATIONS:

September 4/5, 2025 - CPA Ontario, online, Full Day Workshop
November 26/27, 2024 - CPA BC, online, Full Day Workshop
March 26/27, 2024 - CPA Ontario, online, Full Day Workshop
November 15, 2023 - CPA Ontario - Toronto, Full Day Workshop
November 7/8, 2023 - CPA BC, online, Full Day Workshop
September 12/13, 2023 - CPA Ontario - online, Full Day Workshop
July 12, 2023 – Advocis School, Kelowna B.C.
April 5, 2023 - Retirement Management Executive Forum, on-line
December 13/14, 2022 - CPA Ontario, online, Full Day Workshop
November 29/30, 2022 - CPA Ontario, online, Full Day Workshop
April 13, 2021 - Ottawa Share Club, online, "Pitfalls of Retirement Income Planning"
February 19, 2021 – Retirement Income Journal, Demonstration of Otar Retirement Calculator
December 15/16, 2020 - CPA Ontario, online, Full Day Workshop
October 28/29, 2020 - CPA Ontario, online, Full Day Workshop
September 15/16, 2020 - CPA Ontario, online, Full Day Workshop
August 14, 2020 - CPA BC, online, Full Day Workshop
July 28/29, 2020 - CPA Ontario - online, Full Day Workshop
June 3, 2020 - CPA BC, online, "COVID-19 and Portfolio Volatility"
June 2, 2020 - CPA Alberta, online, "COVID-19 and Portfolio Volatility"
May 7, 2020 - CPA Ontario, online, Full Day Workshop
November 27, 2019 - CPA Ontario - Ottawa, Full Day Workshop
November 6, 2019 - CPA Ontario - Vaughan, Full Day Workshop
September 9, 2019 - CPA Ontario - Toronto, Full Day Workshop
December 14, 2018 - CPA Ontario – Hamilton, Full Day Workshop
November 28, 2018 - CPA Ontario – Vaughan, Full Day Workshop
November 19, 2018 – Vancouver, BC – CPA BC Full Day Workshop
November 12, 2018 - CPA Ontario – Thunder Bay, Full Day Workshop
September 21, 2018 - CPA Ontario - Ottawa, Full Day Workshop
July 13, 2018 - CPA Ontario - London, Full Day Workshop
June 12, 2018 – Victoria, BC – CPA BC Full Day Workshop
June 11, 2018 – Vancouver, BC – CPA BC Full Day Workshop
November 16, 2017 - CPABC - Vancouver, Full Day Workshop
November 9, 2017 - CPA Ontario - Waterloo, Full Day Workshop
October 27, 2017 - CPA Ontario - Oshawa, Full Day Workshop
September 18, 2017 - Toronto, IMCA
June 13, 2017 – Vancouver, BC – CPA BC Full Day Workshop
June 12, 2017 – Coquitlam, BC – CPA BC Full Day Workshop
April 26, 2017 - CPA Ontario - Toronto, Full Day Workshop
March 7, 2017 - CPA Ontario - Toronto, Full Day Workshop
December 8, 2016 CPA Ontario Workshop (Full Day), Barrie, ON
November 22, 2016 – Victoria, BC – CPA BC Full Day Workshop
November 21, 2016 – Vancouver, BC – CPA BC Full Day Workshop
November 9, 2016 CPA Ontario Workshop (Full Day), Niagara Falls, ON
October 26, 2016 CPA Manitoba Workshop (Full Day), Winnipeg, MB
September 29, 2016 – CUNA, Newport Beach, California

April 28, 2016 – Vancouver, Canada – CFA Vancouver
March 15, 2016 - CPA Ontario Workshop (Full Day), Markham, ON
December 4, 2015 - IMCA Winter Specialty Conference, Phoenix, AZ
December 3, 2015 - CPA Ontario Workshop (Full Day), Vaughan, ON
November 26, 2015 - CPA Ontario Workshop (Full Day), Kitchener, ON
November 25, 2015 - Advocis, Mississauga, ON
November 6, 2015 – Toronto, Ontario – CPA Full Day Workshop
November 3, 2015 – Vancouver, BC – CPA BC Full Day Workshop
October 29, 2015 - Toronto, Canada – MFDA Senior’s Summit
June 25, 2015 - Markham, Ontario – CPA Ontario Full Day Workshop
March 31, 2015 – Toronto, Ontario – RBC Wealth Management Spring Financial Planning Conference
January 19, 2015 - Toronto, Ontario – CPA Ontario Full Day Workshop
December 12, 2014 - Toronto, Ontario – CPA Ontario Full Day Workshop
December 9, 2014 - Ottawa, Ontario – CPA Ontario Full Day Workshop
December 2, 2014 – Toronto, Canada – CFA Toronto
November 24, 2014 - Mississauga, Canada – CPA Ontario
July 17, 2014 - London, Ontario - Institute of Chartered Accountants of Ontario Full-Day Workshop
June 25, 2014 - Barrie, Ontario - Institute of Chartered Accountants of Ontario Full-Day Workshop
May 14, 2014 - NAPFA Spring Conference, Salt Lake City, USA
February 14, 2014 - Toronto, Canada – MFDA Staff Education Conference
February 13, 2014 - Calgary, Canada – Advocis Calgary Chapter
February 6, 2014 - Calgary, Canada - Institute of Chartered Accountants of Alberta
February 5, 2014 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
December 10, 2013 - Markham, Canada - Institute of Chartered Accountants of Ontario
November 28, 2013 - Toronto, Canada - Certified General Accountants of Ontario
November 6, 2013 - Victoria, Canada - Institute of Chartered Accountants of BC
November 5, 2013 - Vancouver, Canada - Institute of Chartered Accountants of BC
November 4, 2013 - Kelowna, Canada - Institute of Chartered Accountants of BC
October 17, 2013 - Mississauga, Canada - CIFP
July 18, 2013, 2013 - Toronto, Canada - Institute of Chartered Accountants of Ontario
April 18, 2013 – London, Canada – Advocis London Chapter
March 26, 2013 - Calgary, Canada – Advocis Calgary Chapter
March 21, 2013 – Seattle, WA – MTA Puget Sound Chapter
February 19/21, 2013 – Atlanta, Georgia - CUNA
January 17, 2013 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
January 16, 2013 - Calgary, Canada - Institute of Chartered Accountants of Alberta
December 6, 2012 - Toronto, ON - Certified General Accountants
November 20, 2012 – Vancouver, BC - Institute of Chartered Accountants of B.C.
November 19, 2012 – Victoria, BC - Institute of Chartered Accountants of B.C.
November 7, 2012 – Baltimore, MD, NAPFA East Conference
July 13, 2012 – Lake Geneva, WI – Woodbury Financial
June 6, 2012 – Toronto, ON – CFA Institute Toronto Chapter
May 31, 2012 – Washington, D.C. - Merrill Retirement University
May 8, 2012 – Naples, FL - Merrill Retirement University
May 7, 2012 – Miami, FL - Allianz
April 19, 2012 – Vancouver, BC – PPI
April 18, 2012 – Cleveland, OH – Society of FSP
April 3, 2012 – NYC, NY – Structured Products Association

February 10, 2012 - Calgary, Canada - Institute of Chartered Accountants of Alberta
February 9, 2012 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
December 7, 2011 - Toronto, ON - Certified General Accountants
December 6, 2011 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
November 22, 2011 – Victoria, BC - Institute of Chartered Accountants of B.C.
November 21, 2011 – Vancouver, BC - Institute of Chartered Accountants of B.C.
November 18, 2011 - Toronto, ON – Retirement Planning Association of Canada
November 8, 2011 - Toronto, ON - Certified General Accountants
October 25, 2011 – Miami, FL - Allianz
October 12-13, 2011 – Minneapolis, MN - Allianz
September 23, 2011 - Victoria, BC - Certified General Accountants
August 19, 2011 – Salt Lake City -
June 8, 2011 – Roseville, CA -
June 7, 2011 – Oakland, CA -
May 24, 2011 – San Jose, CA - Allianz
May 19, 2011 – Richmond, VA -
May 18, 2011 – Baltimore, MD -
May 5, 2011 – Las Vegas, NV - Lincoln Financial (The Resource Group)
April 27, 2011 – Brookfield, WI -
April 26, 2011 – Chicago, IL -
April 19, 2011 – Minneapolis, MN-
April 12, 2011 – St. Louis, MO- Allianz
March 31, 2011 – Louisville, KY - Allianz
March 30, 2011 – Granger, IN - Allianz
March 29, 2011 – Peoria, IL - Allianz
March 28, 2011 – Phoenix, AZ - Allianz
March 24, 2011 – Charlotte, NC - Allianz
March 17, 2011 – Melville, NY - Allianz
March 14, 2011 – Vancouver, BC - Institute of Chartered Accountants of B.C.
March 10, 2011 – Detroit, MI - Allianz
March 3, 2011 – Washington, DC - Allianz
March 1, 2011 – Birmingham, AL - Allianz
February 23, 2011 – Newton, MA-
February 10, 2011 – Cambridge, ON, Canada – Advocis Golden Triangle
February 3, 2011 – Parsippany, NJ-
December 16, 2010 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
December 9, 2010 – NY, NY - Allianz
November 25, 2010 - Vancouver, BC - Certified General Accountants
November 15, 2010 – Financial Behaviour in Retirement Summit, Chicago, IL
November 10, 2010 - Calgary, Canada - Institute of Chartered Accountants of Alberta
November 9, 2010 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 3, 2010 – Cleveland, OH – Allianz
October 29, 2010 – Baltimore, MD, MACPA
September 24, 2010 – Banff, AB, Canada - Institute of Advanced Financial Planning
August 18-19, 2010 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
August 10, 2010 – Philadelphia, PA – Allianz
June 21, 2010 – Vancouver, BC - Institute of Chartered Accountants of B.C.
June 10, 2010 – Montreal, Canada - Standard Life

May 28, 2010 – Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program
May 5, 2010 – Flint & Troy, MI – Allianz
April 21 – Las Vegas, NV – Lincoln Financial (The Resource Group)
March 23, 2010 – Chicago, IL – Retirement Income Industry Association
March 3, 2010 - Toronto, Canada - Metro Toronto Library
February 11, 2010 – Newport Beach, CA - Allianz
February 10, 2010 – Pasadena, CA - Allianz
February 10, 2010 – Woodland Hills, CA - Allianz
February 9, 2010 – Roseville, CA - Allianz
February 9, 2010 – San Mateo, CA - Allianz
January 18, 2010 - Orlando, FL - AICPA
December 9-10, 2009 - Phoenix, AZ - Allianz
December 8, 2009 - Salt Lake City, UT - Allianz
December 7, 2009 - Seattle, WA - Allianz
November 2, 2009 - Seattle, WA - MTA Seattle Chapter
December 1, 2009 - Vancouver, BC - Certified General Accountants
November 17, 2009 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 16, 2009 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 12, 2009 - Uncasville, CT - Allianz
November 9, 2009 - Vancouver, BC - Institute of Chartered Accountants of B.C.
November 5, 2009 - Birmingham, AL - Allianz
November 4, 2009 - Troy, MI - Allianz
November 3, 2009 - Northbrook and Oak Brook, IL - Allianz
October 30, 2009 - Hershey, PA - PA Bankers
October 29, 2009 - King of Prussia and Harrisburg, PA - Allianz
October 28, 2009 - Red Bank, NJ and Philadelphia, PA- Allianz
October 27, 2009 - NYC and Melville, NY - Allianz
October 26, 2009 - Parsippany, NJ - Allianz
October 20, 2009 - Ingersoll, ON - Financial Horizons
October 16, 2009 - Vancouver, BC - Raymond James
October 13, 2009 - Cleveland, OH - Allianz
October 7, 2009 - Birmingham, AL - Ohio National
October 6, 2009 - Atlanta, GA - Ohio National
August 14, 2009 - Toronto, Canada - Canadian Securities Institute, Canada-China Advanced Program of
Brokerage Business & Wealth Management
June 15, 2009 - Vancouver, BC - Institute of Chartered Accountants of B.C.
June 5, 2009 - Calgary, Alberta - Institute of Chartered Accountants of Alberta
June 4, 2009 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
March 26-26, 2009 - Buffalo, Rochester, NY - Allianz
January 23, 2009 - Atlanta, GA - Integrated Financial Group
December 3, 2008 - New York, NY - MetLife
November 18, 2008 - Calgary, Canada - Institute of Chartered Accountants of Alberta
November 17, 2008 - Edmonton, Canada - Institute of Chartered Accountants of Alberta
November 14, 2008 - Richmond, VA - MetLife
November 13, 2008 - Pittsburgh, PA - MetLife
November 11, 2008 - Louisville, KY - MetLife
November 7, 2008 - Tulsa, OK - Allianz
November 6, 2008 - New Orleans, LA - Allianz

November 5, 2008 - Austin and San Antonio, TX - Allianz
October 29, 2008 - Kelowna, BC - Institute of Chartered Accountants of B.C.
October 28, 2008 - Vancouver, BC - Institute of Chartered Accountants of B.C.
October 27, 2008 - Vancouver, BC - Great West Life
October 23, 2008 - Atlantic City, NJ - MetLife
October 21, 2008 - Phoenix, AZ - Pacific Life
October 17, 2008 - Bay Harbor, MI - MetLife
October 15, 2008 - Dallas, TX - Allianz
October 14, 2008 - Houston, TX - Allianz
October 10, 2008 - Boston, MA - MetLife
October 8, 2008 - Little Rock, AR - Allianz
October 7, 2008 - St. Louis, MO - Allianz
October 3, 2008 - Vancouver, BC - London Life
September 26, 2008 - Kansas City, MO - Allianz
September 25, 2008 - Colorado Springs, CO - Allianz
September 24, 2008 - Denver, CO - Allianz
September 23, 2008 - Oklahoma City, OK - Allianz
September 19, 2008 - New Orleans, LA - MetLife
August 17-21, 2008 - Banff, AB, Banff School, Advocis - The Financial Advisors Association of Canada
August 15, 2008 - Newport Beach, CA - Pacific Life
August 7-8, 2008 - Toronto, ON - Canadian Securities Institute
July 22, 2008 - Buffalo, Rochester and E. Syracuse, NY - MetLife
July 18, 2008 - Newport Beach, CA - Pacific Life
July 2-3, 2008 - Toronto, ON - Canadian Securities Institute
June 27, 2008 - Newport Beach, CA - Pacific Life
June 19, 2008 - Toronto, ON - Canadian Securities Institute
June 16, 2008 - Vancouver, BC - Institute of Chartered Accountants of B.C.
June 10, 2008 - Sacramento and Berkeley, CA, Phoenix Annuities
June 9, 2008 - Del Mar, CA - Transamerica
June 3, 2008 - Cleveland, OH - MetLife
June 2, 2008 - Pittsburgh, PA - MetLife
May 22, 2008 - Vancouver, BC - Certified General Accountants
May 20, 2008 - Miami, FL - FPA, Miami Dade Chapter 3rd Annual Conference
May 16, 2008 - Newport Beach, CA - Pacific Life
May 15, 2008 - Dallas, TX - 1st Global
May 14, 2008 - King of Prussia, PA - MetLife
May 8, 2008 - Hartford, CT - Allianz
May 7, 2008 - Tarrytown, NY - Allianz
May 6, 2008 - Melville, NY - Allianz
May 2, 2008 - Buffalo and Rochester, NY, MetLife
May 1, 2008 - Rochester, NY - Allianz
April 30, 2008 - Las Vegas, NV - MetLife
April 25, 2008 - Atlanta, GA - MetLife
April 7, 2008 - Toronto, ON - Scarborough Retirement Counsel
April 3, 2008 - Troy, MI - Allianz
April 2, 2008 - Foxboro, MA - Allianz
April 1, 2008 - Pittsburgh, PA - Allianz
March 27, 2008 - Birmingham, AL - MetLife

March 25, 2008 - Tampa, FL – Transamerica
March 7, 2008 - Memphis, TN – MetLife
March 6, 2008 - Charlotte, NC – Allianz
March 5, 2008 - Atlanta, GA – Allianz
March 4, 2008 - Orlando, FL – Allianz
February 21, 2008 - Jacksonville, FL – Allianz
February 20, 2008 - Tampa, FL – Allianz
February 19, 2008 - Fort Lauderdale, FL - Allianz
February 13, 2008 - Sacramento, CA – Transamerica
February 12, 2008 - San Francisco, CA – Transamerica
February 8, 2008 - Atlanta, GA – MetLife
January 15, 2008 - Phoenix, AZ - Arizona Institute, Society of Financial Service Professionals
November 23, 2007 - Victoria, BC - Institute of Chartered Accountants of B.C.
November 22, 2007 - Vancouver, BC - Institute of Chartered Accountants of B.C.
November 20, 2007 - Calgary, AB - Institute of Chartered Accountants of Alberta
November 19, 2007 - Edmonton, AB - Institute of Chartered Accountants of Alberta
October 29, 2007 - Las Vegas, NV - Charles Schwab, IMPACT 2007
October 18, 2007 - Kitchener, ON - Advocis, Kitchener Chapter
October 10, 2007 - St. Augustine, FL - John Hancock
September 28, 2007 - Laguna Beach, CA - Pacific Life
August 4, 2007 - Kansas City, MO - Garrett Planning Network, 7th Annual Retreat
July 26, 2007 - Orlando, FL - Prudential Annuities
June 14, 2007 - Richmond Hill, ON - ING Wealth Management
June 12, 2007 - Denver, CO - Million Dollar Round Table
June 7, 2007 - Vancouver, BC - Certified General Accountants
June 1, 2007 - Campbellville, ON – Retirement Planning Association of Canada
May 14, 2007 – Toronto, ON - IMCA
May 10, 2007 – Toronto, ON - Strategy Institute
May 7, 2007 – Ottawa, ON – CALU 16th Annual Meeting
May 4, 2007 - Denver, CO - Main Street Securities
May 2, 2007 - Dallas, TX - Tolleson Wealth Management
April 19-20, 2007 - Allerton Park, IL, Society of Financial Service Professionals, Central Illinois Chapter
March 3, 2007 - Destin, Florida - John Hancock
February 19, 2007 - Vancouver, BC - Institute of Chartered Accountants of B.C.
February 10, 2007 - Laguna Beach, CA - John Hancock
February 8, 2007 - Orlando, FL - John Hancock
January 23, 2007 - Edmonton, AB - Institute of Chartered Accountants of Alberta
January 22, 2007 - Calgary, AB - Institute of Chartered Accountants of Alberta
January 11, 2007 - Boston, MA - John Hancock
January 3, 2007 - Chicago, IL - Popular Investments, National Sales Conference
November 8th, 2006 - Las Vegas, NV - 1st Global Capital Corp
November 2, 2006 - Washington, DC – IMCA, 2006 Advanced Wealth Management Conference
October 21, 2006 - Nashville, TN – FPA Annual Convention
October 17, 2006 - Palm Springs, CA - Society of Financial Service Professionals, Forum 2006
September 15, 2006 - Boston, MA - John Hancock, 2006 Manager's Forum
August 20, 2006 - Banff, AB - Banff School, Advocis - The Financial Advisors Association of Canada
June 27, 2006 – Toronto, ON - The Asset Planning Group
June 8, 2006 - Vancouver, BC - Institute of Chartered Accountants of B.C.

May 8, 2006 - Ottawa, ON – CALU, 15th Annual Meeting
February 9, 2006 – Toronto, ON - York University, Retirement Planning Centre
January 25, 2006 - West Palm Beach, FL - Society of Financial Services Professionals
January 9, 2006 -Markham, ON – PIP Financial
November 30, 2005 - Calgary, AB - Portfolio Analysts Inc.
November 28 - 29, 2005 – Calgary/Edmonton, AB - Institute of Chartered Accountants of Alberta
October 27, 2005 - Victoria, BC - Manulife Financial, Regional Advanced Marketing Seminars
October 25-26, 2005 – Vancouver / Victoria, BC - Institute of Chartered Accountants of B.C.
September 18, 2005 - San Diego, CA - Financial Planning Association (FPA) Annual Convention & Exposition
September 15, 2005 – Ottawa, ON - Advocis - The Financial Advisors Association of Canada - Ottawa Chapter
June 23, 2005 – Toronto, ON - Advocis - The Financial Advisors Association of Canada - Toronto Chapter
June 20/23, 2005 – London/King City, ON - Manulife Financial, Regional Advanced Marketing Seminars
June 13, 2005 – Dartmouth, NS - Institute of Chartered Accountants of Nova Scotia
June 7, 2005 - Calgary, AB - Institute of Chartered Accountants of Alberta
May 26, 2005 - Toronto, ON - Avenue Investments
April 26, 2005 - Hamilton, ON – Credential Group
April 22, 2005 - Allerton Park, IL - Society of Financial Service Professionals, Central Illinois Chapter
November 29/30, 2005 – Calgary/Edmonton, AB - Institute of Chartered Accountants of Alberta
October 15-16, 2004 - Tampa, FL - Society of Financial Service Professionals
October 2, 2004 - Niagara Falls, ON - Retirement Planning Association of Canada
March 11, 2004 – Toronto, ON – York University, “Mathematics of Retirement”
January 21, 2004 – Webcast - Society of Financial Service Professionals
October 26, 2003 – Toronto, ON - Institute of Advanced Financial Planners, 1st Annual Symposium
October 17, 2003 - Kingston, ON - Advocis - The Financial Advisors Association of Canada
October 9, 2003 - Kananaskis, AB - Manulife Financial, Regional Advanced Marketing Seminars
June 16-17, 2003 – Toronto, ON - STEP (Society of Trust and Estate Practitioners), 5th National Conference
May 14, 2003 - Markham, ON - PIP Financial
May 9, 2003 - Burlington, ON - Retirement Planning Association of Canada
October 19-20, 2002 – Ottawa/Kingston, ON - Canadian MoneySaver Investment Conferences
September 18-19, 2002 - On Board Cruise STAR PRINCESS - Canadian MoneySaver Investment Conferences
May 7, 2002 – Toronto, ON - Phillips, Hager & North
March 7, 2002 – Toronto, ON - Equinox Financial
November 28/30, 2001 - Scottsdale, AZ - Canadian MoneySaver Investment Conferences
October 27-28, 2001 - Burlington & North York, ON - Canadian MoneySaver Investment Conferences
February 15, 2001 – Toronto, ON - Canadian Society of Technical Analysts
February 4, 2001 – Calgary, AB – Financial Forum
February 3, 2001 – Calgary, AB - Canadian MoneySaver Investment Conferences
October 2000 - Windsor & London, ON - Canadian MoneySaver Investment Conferences
November 24, 1999 – Toronto, ON - Investment Learning Centre
October 23-24, 1999 - Kitchener & St. Catharines, ON - Canadian MoneySaver Investment Conferences
September 25-26, 1999 - Orillia & Peterborough, ON - Canadian MoneySaver Investment Conferences
January 30, 1998 – Toronto, ON - Financial Forum
March 13, 1997 – Toronto, ON - Canadian Corporate Shareholder Services Association