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Educational Web Cast for Branch Managers & Advisors

Powers of Attorney & Trusts (Part II- English) January 9, 2007 at 4 p.m.

Powers of Attorney & Trusts (Quebec content) French January 19, 2007 at 4 p.m.

Dealing with older clients raises unique issues which confront advisors more often as the general population ages. This can involve difficult situations involving clients and their relatives. Advisors and firms are often faced with the challenges involved in understanding the rights and scopes of Powers of Attorney.

To assist our Members in this regard we are offering a two part web cast series on "Powers of Attorney & Trusts". The content of this Web Cast will cover all the nuances, legalities and advisor responsibilities regarding Powers of Attorney and opening trust accounts.

The first part of the English web cast already took place on December 12th, at 2 pm EST. A recorded version of the web cast may be made available to anyone who missed this first part, by sending a request to MemberServices@ida.ca.

The second part of the English web cast will take place on January 9th, at 4pm EST, for 45 minutes. Upon viewing the two part web cast and the completion of the questionnaire/case study, participants will be eligible for two hours of Continuing Education credits (CE credits) towards Compliance. The questionnaire/case study will not be made available until after the second part of the web cast.

The French web cast (Quebec applicable content) on Powers of Attorney and Trusts has been rescheduled to January 19th, at 4pm EST. The French web cast will be 90 minutes and will combine the contents into one session only. Upon viewing the web cast and the completion of the questionnaire/case study, participants will be eligible for two hours of Continuing Education credits (CE credits) towards Compliance.

Additional information about the program as well as Registration is available at http://www.ida.ca/Media/Events_en.asp.

Kenneth A. Nason
Association Secretary