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For distribution to relevant parties within your firm

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Educational Web Cast for Branch Managers & Advisors

Powers of Attorney & Trusts

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 and as a follow up to our November Web Cast series, our next Web Cast topic is “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 Web Cast will take place on December 12, 2006 at 2pm EST in English and 3:30pm EST in French. This single session Web Cast will be 45 minutes in length and participants will be eligible for one hour of Continuing Education credit (CE Credit) towards fulfilling their compliance requirement.

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

Kenneth A. Nason
Association Secretary