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For distribution to relevant parties within your firm

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Educational Web Cast for Branch Managers & Advisors

Managing a Business & Compliance: Practical Policies from Current Producing Branch Managers

Strong policies and procedures create a foundation for clarifying issues and questions of compliance. Robust and practical procedures help busy branches deal with daily client issues, especially when dealing with older clients.

To assist our Members in this regard and as a follow up to the web casts on Incapacity Advisor Roles & Responsibilities and Powers of Attorney & Trusts, our February web cast will discuss practical Branch Managers' experiences and the solutions they developed. These real examples from active Branch managers can be used as guidance and will create the opportunity for advisors to familiarize themselves with their own firm's policies

The Web Cast will take place on February 13, 2007 at 4pm EST in English. 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