Canadian Credit Union Association | cuSource Professional Development and Education

2018 RAMPED UP AND READY FOR RRSP SEASON VIRTUAL EVENT

December 3, 5, 10, 12 | Register by November 15!

While we encourage our members to consider managing their investments all year long, in reality this topic comes up most frequently when the media starts talking "RRSP Season" and our members are faced with making decisions that could impact both their tax payable and their financial future. It's much easier to talk registered product strategy when the members are looking for one they can use.

Is your team ready to talk? Is your frontline able to provide the investment guidance your members need? RRSPs, RRIFS, TFSAs, LIRAs and more. The terms may be familiar, but how are the products applied in actual member situations?

Join us as we work through credit union member case studies and review other key items that appear on the asset side of their net worth statement.

SESSION #1

APPLY YOUR RRSP KNOWLEDGE WITH MEMBER CASE STUDY

December 3, 2018
1:00 – 2:15 p.m. ET

REGISTER

Targeted for staff who have a solid foundational knowledge of *RRSPs, or who have taken RRSP - The Fundamentals and Tax Free Savings Accounts – The Fundamentals.* This 75-minute virtual event will provide 30-minutes of applied RRSP knowledge, with 30 minutes of hands-on case study work with a subject matter expert followed by 15-minutes of Q&A. Be ready for this RRSP season. The session will focus on:

- Common tax and tax forms (T4RSP/T4RIF and T4As and T2033)
- Assigning or changing beneficiary and standard estate settlement
- Withholding tax and RRSP tax strategies

SESSION #2

APPLY YOUR RRIF KNOWLEDGE WITH MEMBER CASE STUDY

December 5, 2018
1:00 – 2:15 p.m. ET

REGISTER

Targeted for staff who have a solid foundational knowledge of RRSPs and have taken *Apply Your RRSP Knowledge with Member Case Study.* This 75-minute virtual event will provide 30 minutes of applied RRIF knowledge, with 30-minutes of hands-on case study work by a subject matter expert followed by 15-minutes of Q&A. Be ready to answer your member's RRIF questions. The session will focus on:

- RRSP to RRIF conversion and minimum payment options
- Successor annuitant appointment
- Pension income splitting and standard estate settlement

SESSION #3

APPLYING YOUR RESP KNOWLEDGE WITH MEMBER CASE STUDY

December 10, 2018
1:00 – 2:15 p.m. ET

REGISTER

Targeted for staff who have a solid foundational knowledge of RRSPs and have taken *Apply Your RRSP Knowledge with Member Case Study.* This 75-minute virtual event will provide 30 minutes of applied RESP knowledge, with 30-minutes of hands-on case study work by a subject matter expert, followed by 15-minutes of Q&A. Be ready to guide your member's with the best RESP information. The session will focus on:

- Understanding the Canada Education Savings Grant (CESG), the Canada Learning Bond and how each are used
- Understanding the options available to members in their educational payment planning
- Standard RESP handling for events such as relation breakdown, death or alternative post-secondary education choices

SESSION #4

PENSION PLANS, LIRAS AND LIFS IN A MEMBER'S INVESTMENT PORTFOLIO

December 12, 2018
1:00 – 2:15 p.m. ET

REGISTER

Targeted for staff who require a general understanding of the additional assets that may appear in a member's investment portfolio. Attendees should have a solid understanding of registered products (RRSPs, RRIFs etc.) or have completed the previous sessions of the Ramped up and Ready for RRSP Season virtual events.

This 75-minute presentation will tackle questions such as:

- The difference between a defined benefit and a defined contribution pension
- The difference between locked-in and registered pension plans
- Where to find information about jurisdictional differences for your member's plans
- How does a member reach their investment goals in a long-term low-rate environment?

Get ready to assist your members with their entire investment portfolio.

MEET YOUR FACILITATORS

PETER BELLWORTHY

Peter Bellworthy has a proven record and expertise in coaching, training, sales, and change management, developed through an extensive and successful career in the banking sector and within the credit union system. Following a successful career with Royal Bank Financial Group where he held management and senior management positions in various locations, Peter moved to the credit union system in 2000 when he joined Credit Union Atlantic as branch manager of their main Halifax branch. Peter held various positions of increasing responsibility, including Director Human Resources, Vice President Business Development, and Vice President Relationship Development & Lending. In this capacity, his responsibilities included the overall direction, growth, and profitability of the credit union, as well as oversight of the branch network and both the commercial and retail lending functions.

In 2012 Peter formed Credit Union Consulting to assist credit unions with development and execution of strategies, business development, training, and consulting needs. Projects to date have included the development of FSO and investment training and overseeing branch operations for Eagle River Credit Union at their Goose Bay Nfld location, development and presentation of a national seminar for CUSOURCE Knowledge Network, as well as the development and delivery of a mortgage attraction strategy for Bergengren Credit Union

REGISTRATION & PRICING

Conference Bundle

Purchase a single seat in all 4 sessions. (Non-transferable, single employee only)

- **Corporate Members - $329 (per employee)**
- **Pay As You Go - $420 (per employee)**

REGISTER NOW FOR BUNDLES

Individual Webinars

Attend as many webinars as you'd like and register for each separately. Use the "register now" links on page 2 and 3 or search by title in the [Learning Gateway] to register.

- **Corporate Members - $89 (per webinar)**
- **Pay As You Go - $110 (per webinar)**

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For more information or registration assistance, contact Client Solutions:
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