



Agenda

Enrol

Speakers

The thought leadership is outstanding at Virtual DAC 2021, October 17-19.

Program Director Evelyn Jacks is highly enthused: "It's never a small feat, but this year we are thrilled to offer the richest program ever to help advisors help their clients rediscover their financial stride."

Featuring eight senior executives, two best-selling authors, leading scholars and top wealth advisors.

Meet the Speakers:



Dr. Paul Bates
Why We Need to Do More:
The Notion of Ethos



Frank Ryan
Master of Ceremonies:
Welcome



Evelyn Jacks
Practice Management:
The Greatest Recovery
on Earth



Dr. Jack Mintz
Investment Planning:
What If Conventional
Wisdom is Wrong?



**Christine Van
Cauwenberghe**
Intergenerational Wealth
Planning With Trusts



Dr. Dean Smith
Global Families:
Beware the Multi-Million
Dollar Tax Traps



Darrell Keezer
Digital Disruption:
Social Media Strategies
for Leaders



Tony Mahabir
How Much is Enough?
Host: Denim & Diamonds
Awards Gala



Joe Glionna
Starting Points:
Lessons Learned and How
to Build On Them



Som Sief
Digital Finance and
Its Implications



Kiran Thakkar
Privacy, Security, and The
Small Business Owners



Chris Logan
Ask the Experts Panel:
Ethical Dilemmas



Lori Lee
Financial Risk Management:
Re-Building
Financial Health



Dr. Brian Shaw
Managing Mental Health:
Taking Care of Our
Human Resources



Kim Moody
Wealth Planning:
Are Wealth Taxes on
The Horizon?



Jordy Chilcott
Executive Suite - Dare to
Dream Big: Why The Future
is Bright for Advisors in a
New Economy

EVERYTHING IS INCLUDED:

STELLAR EDUCATION, UP TO 30 CE CREDITS,
AND ALL THE LIBATIONS TO MAKE THIS YOUR
BEST CONFERENCE EVER!

Join Us in Thanking This Year's Sponsors!



World-Class Financial Education

Let's Connect: 1.866.953.4769 • www.knowledgebureau.com