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Last Chance To Register For: Planning Opportunities with Business Owners

Submitted by Rica Zara on January 17, 2022 - 1:00am

**Upcoming Events
Across B.C. Region**

GREATER VANCOUVER KOOTENAY VANCOUVER ISLAND THOMPSON OKANAGAN

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Planning Opportunities with Business Owners

Please join Advocis Thompson Okanagan as they collaborate together with Greater Vancouver, Kootenay and Vancouver Island chapters.

On **Thursday, January 20, 2022 at 12:00 P.M. (PST) Brad Hyde**, from

IDC Worldsource Insurance will be presenting a study on Planning Opportunities with Business Owners. **Not Sure Of Your Advisor?** [Redacted] hosts a Q&A.

Tickets are available on a first-come-first-serve basis. As a benefit of membership this webinar is **FREE** for Advocis Members (and \$100 for Non-members).

[Register Now](#)

Available spots are limited and will be on a first come, first served basis.

- Use your **Advocis Membership ID** to trigger the promotional discount in

Event Description: Registration closes January 18, 2022 at 12:00 P.M. (PST). This session will assist in understanding the importance of business owner's checklists. **Presenter: Brad Hyde** (CE Credit available)

Brad Hyde

Questions:

Director, Tax & Financial Planning

If you have a question, please reach out to the Advocis Thompson Okanagan office primarily to support. He spent several years working in the financial services industry moving to

A self-proclaimed Advisor to Advisors, he has spent most of the last 17 years helping advisors build their practices through a variety of support mechanism including seminars, mentoring, joint field work and joint case development.

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Brad has taken on the responsibility for providing product and technical support to financial advisors that are working or want to work in the business owner, family enterprise and high net-worth markets. He uses a team-oriented approach by ensuring business synergy and collaboration between all parties including the client, the Insurance Advisor, and other Professional Advisors (Accountants and Lawyers) to provide practical solutions that are tailored for each client.

Brad has an Honours Business degree in Finance and Marketing (BBA), and holds various industry designations, including: Certified Financial Planner (CFP), Chartered Life Underwriter (CLU), Certified Health Insurance Specialist (CHS) and Elder Planning Counselor (EPC). Brad is a member of the Conference for Advanced Life Underwriting (CALU) and recently served as a Board member on the Edmonton Estate Planning Counsel and sits on the Board of Directors for a cybersecurity company.