

COMMENT BACKGROUND

Number 255 – MAY / JUNE 2009

PLANNING IN A DOWN MARKET

Income Tax Act references:


- subsection 50(1) – debts established to be bad debts
- subsection 148(7) – disposition of a life insurance policy at non-arm's length

PROPOSED LIFETIME BENEFIT TRUST

Income Tax Act references:

- proposed section 60.011

ADDRESSING PERMANENT LIFE INSURANCE NEEDS








i choose ... CFP[®]/CLU[®] Update 2009 **EDUCATION**

I choose integrity, knowledge, community I choose Advocis.


Brush up & boost your bottom line: CFP[®]/CLU[®] Update 2009

Recent changes and current planning strategies for delivering financial advice in today's economy.

The Experts

 Ted Ballantyne , B.B.A., LL.M., CMA, TEP CALU	 Peter A. Wouters , RFG, AIAA, AIR, TEP, FLMI, RHU, CFP, CLU, Ch.F.C., ACS, ALHC, EPC, AFSI The Empire Life Insurance Company
 Peter Everett , LL.B., CLU, TEP PPI	 Rachel Blumenfeld , B.A., M.A., LL.B. Miller Thomson LLP
	 Thérèse Reilly , B.A., LL.B., LL.M., CFP/C Advocis

The Moderator

 Dennis Yanke , CFP, CLU, Ch.F.C. YourLegacy.ca
--

Presented by Advocis Chapters for Advocis members.

To learn more, please visit: www.advocis.ca

Advocis[®]
The Financial Advisors Association of Canada

Advocis[®], CLU[®] and AIAA[®] are trademarks of The Financial Advisors Association of Canada.