

7 Masterclasses You Can't Afford to Ignore

Masterclass Catalogue

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Masterclass Details

- Each masterclass is educational and covers strategies for success
- The implementation for each advisor to personalize the knowledge is covered in an interactive workbook for each masterclass
- Masterclasses can be grouped to build courses which apply to segmented advisors and groups to achieve growth and development
- There are a variety of delivery options to choose from

Here is an overview of the 7 Masterclasses you can't afford to ignore:

Advisor Computer Compliance

Cyber threats are rising. If you aren't meeting digital security standards, you are already vulnerable. Learn how to protect your client data before hackers expose your weakest link.

Building Compliant, Trusted Client Relationships

Trust isn't enough. Regulators are watching. Master the compliance-driven relationship framework that keeps your business safe and thriving.

Complying with AML & Anti-Terrorist Financing Legislation

If your name appears in a financial crime investigation, your career is over. Know exactly how to prevent your firm from becoming a target.

Canada's Anti-Spam Legislation (CASL)

Think you're safe from penalties? Think again. Mistakes in email marketing could cost your company up to \$10 million in fines. Master CASL compliance before regulators come knocking.

10 Privacy Principles According to PIPEDA

Data breaches happen daily. If you don't know these privacy principles, you're already at risk. Avoid lawsuits, government fines, and shattered client trust—before it's too late.

Phishing Think Before You Click

Elevate your cybersecurity awareness with Phishing: an essential guide to detecting and preventing phishing scams targeting financial professionals. Learn to recognize red flags, implement security best practices, and safeguard client data against evolving cyber threats.

Advisor Audit Mastery

The *Advisor Audit Mastery* Masterclass equips financial advisors with a proactive compliance framework built around six key pillars—from client engagement to ongoing supervision. Through mock audits, binder-building strategies, and continuous readiness practices, it empowers advisors to confidently navigate regulatory audits and elevate professional standards.



About Dan Hostick

Dan graduated with a B. Comm from McMaster University in 1971. He was very involved on campus with several organizations. He was a varsity hockey player for four years and was selected Captain of the hockey team in his final year. Dan immediately went into the insurance industry with London Life as a leading advisor, head office trainer and field regional director. His career was very accomplished as a field leader spanning 35 years with three large insurance companies. He achieved his CLU, ChFC and CFP designations.

Upon retirement from his distinguished career as an advisor and field leader he has spent over the last decade consulting and coaching distribution organizations and advisors to success. He also was a partner in building software for coaches. Dan writes and delivers training masterclasses designed to help advisors succeed and realize their potential. Many advisors and coaches have been participants in his training masterclasses and enjoyed the benefits of these strategies.

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