CE Drive Podcast

Season One

S01E01 – Disability Tax Benefits

In this very first episode of CE Drive, Jason discussed disability tax benefits, their pros and cons, and their nuances with his guests, Derek and Melanie.

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S01E02 – Unraveling Divorce

In this episode, Jason and his guests, Kelly and Jeff, talked about divorce from the perspective of financial planning.

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S01E03 – Advisor Education

In this episode, Jason discussed the benefits of advisor education, how to choose the education that works for you, and much more with his guests, Kent and Ian.

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S01E04 – Canada Pension Plan Decisions

In this episode, Jason and his guests, Kent and Marshall, talk about Canada Pension Plan and how to utilize it.

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S01E05 – Behavioural Finance

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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S01E06 – Client Asset Management

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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S01E07 – Optimizing Client Value

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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S01E08 – Retirement Planning

In this episode, Jason and his guests, Chris, Craig, and Mitchell, share their ideas and experiences in retirement planning.

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S01E09 – Registered Disability Savings Plan

In this episode, Jason and his guests, Craig and Ian, revisit financial planning for people with disabilities, specifically regarding the RDSP.

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S01E10 – Financial Planning Concepts

In this episode, Jason and his guests, Shyam and Chris, discussed two specific financial planning cases. One of them is about clients who are small business owners and the other about clients who are relocating to Canada from the U.S.

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S01S01 – CFP Board Research

In this bonus episode, Jason is on location at the CFP Board Conference with Ryan and Tanya. They share their experiences at the conference and their favorite sections.

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Season Two

S02E01 – Capacity Concerns

Join Jason and his guests Mitchell and Garrett as they discuss buying a block of investment business, and getting clients used to hearing retirement advice from a young advisor.

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Saskatchewan	1 Life Credit 1 Ethics Credit
Manitoba	1 Life and/or A&S Credit
Ontario	1 CE Credit
FP Canada	1 Professional Responsibility Credit
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S02E02 – Generating Value for Clients

In this episode, Jason and his guests, Derek and Dawn, explore complex financial planning topics covering capacity concerns.

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S02E03 – Unconventional Solutions

In this episode, Jason and his guests, Nathen and Kelley, talked about using elements of the financial planning process to bring values to their clients.

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S02E04 – Getting Started

In this episode, Jason and his guests, Mitchell and Megan, explore some unusual solutions to unusual problems.

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S02E05 – Certification and Incorporation

Join Jason and Ray as they discuss the benefits of incorporation for a medical professional. They also discuss the state of regulation of financial planning and financial advice.

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S02E06 – Incorporation

Join Jason and Ray as they continue their discussion about incorporating!

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S02E07 – Debt Management

Join Jason and Ian in this episode about debt management.

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S02E08 – Insuring Business Owners

In this episode, Jason and Michael discuss a couple of scenarios in which Michael was able to put insurance in force to support buy-sell

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S02E09 – OCIO Part 1

In this episode, Jason and his guests, Kelvin and Derrick, share insights about managing assets.

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S02E10 – OCIO Part 2

Join Jason and Steve for a discussion of the role of the Outsourced Chief Investment Officer.

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S02E11 – RRIF Beneficiary Gone Wrong

Jason and his guest, Chris, discuss a RRIF beneficiary designation gone wrong and how it was resolved.

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S02E12 – Retirement Planning and CPP Disability

In this episode, Jason and his guests, Tab and Brad, discuss retirement planning, specifically pensions and CPP disability.

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S02E13 – Life Insurance Leverage

In this episode, Jason and Darren discuss life insurance leverage strategy.

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Manitoba	1 Life and/or A&S Credit
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S02E14 – Mental Health and Underwriting

Join Jason and Jessica for a discussion of insurance underwriting.

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S02E15 – Contingency Planning for Businesses

Join Jason and Erin for a discussion of the perils of business owners who have not done sufficient personal planning, and how the advisor can help mitigate these concerns.

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S02S16 – Cash Flow Planning for Business Owners

Join Jason and Lisa for a discussion of cash flow planning for business owners.

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Manitoba	1 Life and/or A&S Credit
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S02E17 – Incapacity Planning

Join Jason and Erin for a discussion of incapacity concerns, followed by Jason discussing policies and procedures for testing a client's capacity.

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S02E18 – Business Valuation

Join Jason and Certified Business Valuator Eric Mah for a discussion of business valuation principles.

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S02E19 – Group Benefits: Communication and Risk

Join Jason and group benefits broker Lori Power for a discussion of communication and risk issues in group benefits contracts.

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S02E20 – Content Marketing

Join Jason and advisors Shawn Todd and Corey Butler.

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Season Three

S03E01 – Workers Compensation

Join Jason and lawyer Howard Goldford discussing how WCB in Alberta administers claims, how disputes are handled, and how this relates to other income loss benefits.

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S03E02 – Freelancing in Financial Planning

Join Jason and financial planner Alexandra Macqueen for a wide-ranging discussion concerning a range of financial planning issues.

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S03E03 – Introducing the CPP Calculator

Join Jason and financial planner and entrepreneur David Field for a discussion of David's online CPP calculator.

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S03E04 - Estate Planning Challenges for Financial Advisors

Join Jason and financial planners Christopher and Steven as they discuss some of the challenges financial advisors encounter in helping clients with their estate planning.

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S03E05 – Retirement Compensation Arrangement

Join Jason and financial planner Tim as they discuss the Retirement Compensation Arrangement from both a technical and behavioural perspective.

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S03E06 – RDSP Specialist

Join Jason and financial planner Johnathan as they discuss the finer points of the RDSP. Johnathan is highly knowledgeable about the RDSP and teaches Jason a few things along the way!

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S03E07 – Advising Physicians

Join Jason and financial planner Adrian George as they discuss advising physicians. They discuss Adrian's path to deal with physician clients. Adrian's technical expertise and knowledge of behavioural finance concepts play prominently in his practice.

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S03E08 – AML Why it Matters

Join Jason and AML expert Mike Cosgrove of TAMLO as they discuss the realities of money laundering and how it impacts financial services professionals.

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S03E09 – Nerding out on Group Benefits

Join Jason and Dave Patriarche of Canadian Group Insurance Brokers and Mainstay Insurance. Dave is one of Canada's leading authorities on group benefits.

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S03E10 - TPAs and Other Acronyms You Need to Know

Join Jason and Mike McClenahan of Benefits By Design (BBD) and president of the Third Party Administrators Association of Canada (TPAAC). Mike covers a broad range of group benefits topics, including building a business, the importance of education, and flexible benefit plans.

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Manitoba	1 Life and/or A&S Credit
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S03E11 - Retirement Income Planning

Join Jason and Mark Walhout of Walhout Financial for a discussion around retirement planning. Mark applies an evidence-based approach to retirement income planning and only serves families who are anticipating retirement.

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S03E12 – HSAs and the Value of Expertise

Join Jason and Steve McEwan of MyHSA for a conversation concerning Health Spending Accounts. Steve is one of Canada's leading experts in the field. He understands the taxes and the risks of these plans and has built a successful business providing service to advisors.

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S03E13 – The Overlap Between the Leasing Business and Financial Planning

Join Angela Armstrong of Prime Capital for a discussion of the leasing business. Angela has been providing capital to small and medium businesses for two decades. Her relationship with her customers will sound very familiar to any financial advisor.

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S03E14 - The Truth About Health Care Preferences

Join Dr Daren Heyland of www.planwellguide.com for a discussion about health care decision-making and preferences. Dr Heyland discusses where financial advisors could better position health care decision-making

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S03E15 – Deciphering Cryptocurrency Part I

Cybersecurity consultant Mike Alguire joins Jason for a discussion of all things crypto-currency in the first of a two-part series. In this episode we discuss the mysterious origins of bitcoin and what mining is.

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S03E16– Deciphering Cryptocurrency Part II

Cybersecurity consultant Mike Alguire joins Jason for a discussion of all things crypto-currency in the second of a two-part series. In this episode we discuss bitcoin mining and investing in cryptocurrencies.

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