Ron Haik, As Vice-President, Investment Advisory Services at CDSPI Advisory Services Inc. exclusively serving the dental community, Ron Haik is an expert in providing financial solutions specific to the needs of dental professionals. Ron leads a team of advisors who provide clients with comprehensive financial planning advice, helping them integrate both their personal and corporate assets into custom-tailored investment and estate plans.

Ron has practised in the financial services industry for over 20 years. He has extensive experience as a financial planner, stockbroker, and in the areas of both domestic and offshore private banking. He has taught as a professor and has lectured at universities and trade conferences across Canada. He has an MBA with a double-major in finance and financial services, has attained the Certified Financial Planner and the Trust and Estate Practitioner designations, is a Fellow of the Canadian Securities Institute and is among a select group of individuals who hold the Chartered Strategic Wealth Professional designation. Ron is married with four kids, two rabbits and one dog (which is why he recently took up long distance running, having completed a marathon recently).

TOPIC: Developing your Million Dollar Plan

Ron will walk you through a comprehensive financial plan to demonstrate a systematic approach to achieve financial independence. Ron examines wealth building scenarios from a dentist’s perspective through the use of a case study to answer three commonly asked questions by his clients:

1. Will I have enough to retire?
2. Am I taking on too much risk in my portfolio?
3. How do I build a portfolio if I am 20 years away from a goal? 10 Years away? While in retirement?

Renata Whiteman, As a Professional Advisor at CDSPI Advisory Services Inc. exclusively serving the dental community, Renata Whiteman is an expert in providing insurance solutions specific to the needs of dental professionals across Canada. By understanding clients’ unique situations, she helps them determine what types and amounts of insurance are appropriate for both their personal and business needs.

Renata has completed numerous industry courses relevant to insurance, and has over a decade of experience in the industry. She is licensed as a general insurance broker and a life, accident and sickness insurance agent. She is an avid
traveller, and loves to experience the local life in different places — including shopping locally.

**TOPIC: Leveraging Insurance to Protect your Wealth, Your Business and Your Career**

Renata will present the concept of insurance as a critical factor in helping you manage risk effectively. The discussion will cover potential risks, and the strategies to put in place to protect dentists in three key areas – your personal financial well being and ensuring your loved ones are protected from financial hardship; ensuring your practice and your staff can carry on in the event that your practice cannot operate; and highlighting best practices to protect yourself from an unforeseen malpractice claim.