

# Financial Planning Lecture Series 2016

A Five-Part Series for UBC Faculty Association Members

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**Time: 12:40 – 1:25 pm**

**Lecture Hall 1, Woodward IRC, 2194 Health Sciences Mall**

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**Tuesday, January 26**

**Budgeting for Retirement: Putting your Plan in Place**

*Alain Quennec, CFP FMA CIM*

Putting a financial plan in place for retirement can begin at any stage of your career – and ideally as early as possible. Alain Quennec will offer advice to help you organize your retirement process. Benefit from an overview of key components to your financial plan including: estate planning, insurance, government and private pensions, tax planning, and investing for lifetime income.

**Tuesday, February 2**

**Planning for Future Incapacity**

*Monique Shebbeare*

You may have heard of a Living Will, but do you really understand what documents you and your family members need to ensure the right people have the right authority to help you with health and personal care decisions if you can no longer make these decisions for yourself? What documents should you encourage your family members to have in place? Monique Shebbeare, an estate planning lawyer in Vancouver, will discuss Representation Agreements and Advance Directives as tools to plan ahead for health care decision making during incapacity.

**Tuesday February 9**

**Investment Market Update - UBC Faculty Pension Plan**

*Mike Leslie, Executive Director – Investments, Faculty Pension Plan*

*Neil Watson, Vice President, Senior Partner, and Portfolio Manager, Leith Wheeler Investment Counsel Ltd.*

Find out what happened in the equity and bond markets in 2015. Learn the main reasons behind last year's performance, and what areas did, or did not, do well. We will discuss the outlook on how the markets may unfold in 2016 including the key drivers and concerns that may affect these markets.

**Tuesday, February 23**

**US Taxation and Cross Border Planning**

*Will Todd, DLA Piper*

Most Americans who reside in Canada are now aware of their U.S. taxation and compliance obligations and many have questions about the alternatives available and potential consequences, given recent legislative changes, IRS announcements and commentary in the media. In addition, if you, your spouse or your beneficiaries are citizens or residents of the U.S., considering the potential impact of American taxation may reduce or defer the tax to be paid.

**Tuesday, March 1**

**Is Real Estate Part of Your Financial Plan?**

*Thomas Davidoff, Associate Professor, Sauder School of Business*

Traditionally, home ownership has been the major component within a financial investment plan. Is this still the case, especially given the high cost of Vancouver real estate? Has recent economic turbulence affected the ways we think about owning, downsizing, renting or investing in property? What do the numbers and patterns over time tell us about the risks and benefits of real estate within an individual or a family financial plan?

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