



October 6 - 8, 2010

# 2010 Fall Conference and Financial Fitness Forum

August 2010

*Marking another year as Canada's leader in Financial Counselling Education*

Dear Colleague,

You're Invited! Please see the attached Conference Agenda and Registration Form for the 2010 Fall Workshop and Financial Fitness Forum, being held at the Radisson Admiral Hotel in downtown Toronto, Ontario! This venue, on the Toronto Harbourfront, provides a spectacular setting for the Conference. You will find yourself within walking distance of the CN Tower, Rogers Centre and everything that downtown Toronto has to offer.

This year's event will provide the important professional development and education that is needed by today's professional in the Credit Counselling industry. During this conference, you will experience industry leading educational sessions and the opportunity to network with fellow financial counselling professionals.

Your hotel accommodations will need to be made directly with the hotel, as noted on the conference registration form. When you reserve your room, simply mention the Ontario Association of Credit Counselling Services. Please book your room early, as a limited number of Radisson rooms are available.

If you have any questions about the conference, please give us a call. I'm looking forward to seeing you in October!

Sincerely,

Henrietta Ross,  
Chief Executive Officer and Executive Director



October 6 - 8, 2010

# 2010 Fall Conference and Financial Fitness Forum

## CONFERENCE AGENDA

### DAY ONE: Wednesday, October 6

**Conference Registration & Welcome Lunch** - Room: *Ballroom Foyer - 3rd Floor*

11:00 AM

**Conference Session 1** - Room: *Salon B - 3rd Floor*

12:00 PM - 1:00 PM

#### **Financial Literacy and Beyond!**

This opening session will provide Conference Delegates with the opportunity to explore the latest news in the financial literacy profession while getting acquainted with fellow Delegates.

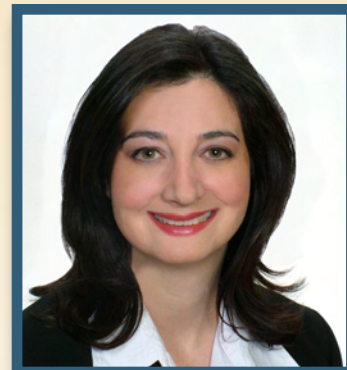
**Conference Session 2** - Room: *Salon B - 3rd Floor*

1:00 PM - 2:30 PM

#### **Keynote: Laughter is the Best Medicine**

Laughter can be a powerful tool in any work environment; it can help us take ourselves lightly but our jobs seriously. A quick injection of laughter is a perfect addition to any work day, meeting or discussion. Learn how laughter can reduce stress, improve and strengthen relationships and boost productivity and morale. Research and applications on effective laughter at work are discussed in this fun and interactive workshop.

This session will be led by the enthusiastic and engaging Wendy Woods, Principal of Watershed Training Solutions. Wendy's firm specializes in providing workplace skills for stress management, productivity and effective communication. Wendy is an active member of the Strategic Capabilities Network, as well as the International Psychology Association. Wendy's expertise has been featured in such media as CTV News, Breakfast Television, Rogers Daytime, Classical 96.3, Entertainment Tonight Canada and Canadian Business Online.



**Break** - Room: *Ballroom Foyer - 3rd Floor*

2:30 PM - 2:45 PM

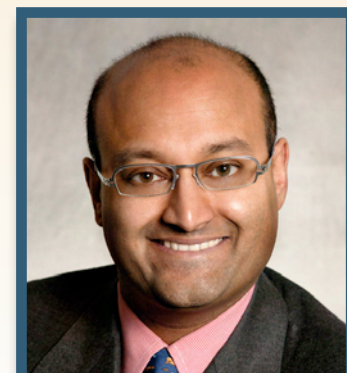
**Conference Session 3** - Room: *Salon B - 3rd Floor*

2:45 PM - 3:45 PM

#### **Legal Clinic**

Discover the latest in consumer credit law, collections and small claims court processes and how these matters impact consumers and debtors. Join Sanjeev Mitra, LL.B, B.Sc. of Aird & Berlis LLP, for this participatory Legal Clinic, providing you with insights and practical information. Your questions will also be welcomed.

Sanjeev Mitra is a partner and member of Aird & Berlis' Financial Services Group. Sanjeev's practice focuses on bankruptcy and insolvency law. In addition, Sanjeev acts for Receivers, Trustees in Bankruptcy and Court Appointed Officers in matters involving both commercial and consumer insolvency. A number of matters in which Sanjeev has been involved are now precedents in the area of insolvency law.





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# 2010 Fall Conference and Financial Fitness Forum

## CONFERENCE AGENDA

### DAY ONE: Wednesday, October 6

Conference Session 4 - Room: Salon B - 3rd Floor

3:45 PM - 5:00 PM

#### Rookies and Rockstars

Join this interactive panel discussion with the industry's newer Financial Counsellors and seasoned Financial Counselling Pro's. These Rookies and Rockstars will combine and share their deep knowledge and fresh ideas as they address challenging counselling scenarios with practical and innovative techniques and proven solutions. Immerse yourself in these experiences to expand your own counselling strength with strategies and tips that will surely help you navigate difficult counselling situations with greater ease.

Conference Session 5 - Room: Salon B - 3rd Floor

5:00 PM - 5:30 PM

#### Networking for Professionals

What's new? Join your Counselling colleagues during this networking opportunity to catch up with each other, share ideas and discuss trends.

### DAY TWO: Thursday, October 7

Learning Forum & Welcome Breakfast - Room: Ballroom Foyer - 3rd Floor

8:00 AM

Conference Session 6 - Room: Salon B - 3rd Floor

9:00 AM - 11:45 AM

#### Keynote: Stopping Overshopping - A Workshop for Credit Counsellors and Financial Coaching Practitioners

This workshop will offer skills, tools, and strategies that Counsellors and Coaches can use with clients to help them reduce, if not eliminate, their overshopping behaviour.

April Lane Benson, Ph.D. will provide an overview of compulsive buying and offer guidelines to help participants determine if a client is a compulsive buyer. Discussions will include whether, when, and how to intervene and discuss general principles regarding intervention. Dr. Benson will introduce several effective and easily learned techniques to use with overshopping clients and talk about how to help a client find additional resources to broaden the base of support.

Dr. Benson is a nationally known psychologist who specializes in the treatment of compulsive buying disorder. She is the co-founder of the Center for the Study of Anorexia and Bulimia, and a member of the Board of Directors of the Institute for Contemporary Psychotherapy. In private practice for over 30 years, Dr. Benson and her associates offer individual treatment and group coaching and train therapists who want to learn to work with overshoppers. She's appeared widely in the media, most recently on the "PBS Nightly Business News", "Good Morning America", the "Today Show", the CBS Evening News, "The Bank of Mom and Dad" and "My Strange Addiction." Quoted in The New York Times, Wall Street Journal, Los Angeles Times, Washington Post, Chicago Tribune, The Christian Science Monitor, and The Toronto Star, she has also been referenced in Time, Money, Kiplinger Personal Finance, Ladies' Home Journal, Vogue, Cosmopolitan, Harper's Bazaar, Redbook, Marie Claire, and a variety of internet publications.





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# 2010 Fall Conference and Financial Fitness Forum

## CONFERENCE AGENDA

### DAY TWO: Thursday, October 7

**Break - Room:** *Ballroom Foyer - 3rd Floor*

10:00 AM - 10:15 AM

**Lunch - Room:** *Ballroom Foyer - 3rd Floor*

11:45 AM - 1:15 PM

#### **Counsellor Certification Awards Luncheon and Keynote Session**

Celebrate with your fellow colleagues for the annual Certification Awards Luncheon where professionals throughout the network will be recognized for their achievement of successfully obtaining their Accredited Financial Counsellor Canada designation and their OACCS Certified Credit Counsellor designation.

Keynote speaker Sunjay Nath will address the group on the 10-80-10 Principle, a concept that helps professionals operate at a dynamic level. 10-80-10 combines best practices with small wins to help people achieve more and have greater balance by improving performance. An engaging speaker, a gifted author and an accomplished entrepreneur, Sunjay Nath also holds a degree in Mathematical Engineering and a Masters in Business Administration. For more than 15 years, Sunjay has delivered inspiring, humorous, and energetic presentations filled with real-life experiences. Sunjay has served as President of the Canadian Association of Professional Speakers, Toronto Chapter, and as President of his Engineering Discipline. He has also earned the Certified Speaking Professional Designation (CSP), which is the highest international level a speaker can achieve. At the time of earning this honor he was third youngest to achieve the designation in the world.



**Conference Session 7 - Room:** *Salon B - 3rd Floor*

1:15 PM - 5:00 PM

#### **CyberCounselling Workshop for Counsellors**

This engaging "hands-on" workshop spans the realm of theory to practical application. Gain the skills development that is important to obtain solid grounding in ethics, theory and techniques to elevate your text communication to become more personal and more impactful. Using Therapy Online's Presence Techniques, the topics covered will include ethical issues, security and confidentiality, challenges in offering services, dealing with a crisis, indications and contraindications, advantages and challenges of text-based work, disinhibition, emotional bracketing, descriptive immediacy, clinical process and the therapeutic alliance exercise.

This session will be lead by Lawrence Murphy, the co-founder of Worldwide Therapy Online Inc. which is the world's first online clinical practice, established in 1994. In collaboration with the National Board for Certified Counselors, he and co-founder Dan Mitchell authored the first ethical code for online counselling with the National Board for Certified Counselors and have published some of the most important academic works in the field including research of the critical elements of effective online counselling. Through the Therapy Online Research Institute, Lawrence has published extensively in the field of cybercounselling. He has addressed numerous Canadian and International Conferences and has taught at the graduate and post-graduate level at universities across Canada. Lawrence holds an MA in Counselling Psychology from UBC.





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# 2010 Fall Conference and Financial Fitness Forum

## CONFERENCE AGENDA

### DAY TWO: Thursday, October 7

**Break - Room:** *Ballroom Foyer - 3rd Floor*

**2:30 PM - 2:45 PM**

**Conference Session 8 - Room:** *Salon B - 3rd Floor*

**5:00 PM - 5:30 PM**

#### **Networking for Professionals**

What's new? Join your Colleagues at this networking opportunity to catch up with each other, share ideas and discuss trends.

### DAY THREE: Friday, October 8

**Learning Forum & Welcome Breakfast - Room:** *Ballroom Foyer - 3rd Floor*

**8:00 AM**

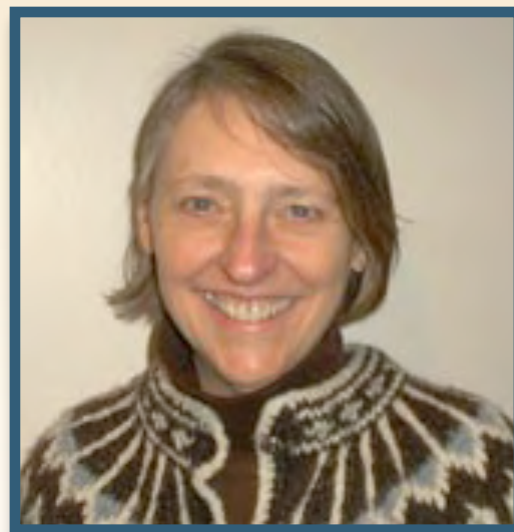
**Conference Session 9 - Room:** *Salon B - 3rd Floor*

**9:00 AM - 10:30 AM**

#### **Keynote: Moving from Stress to Success - Ease Up! Stress Release Strategies from Educational Kinesiology**

Why is stress so significant for your physical health and for clear, creative thinking and what can you do about it? Using playful, thought-provoking demonstrations, we will explore the answers to these questions. You will learn a variety of simple, quick physical strategies that can help minimize stress for you, your clients, and your family. Be amazed by the simple techniques, drawn from Applied Kinesiology and Educational Kinesiology, that can make such significant changes in stress resolution, health, and mental acuity.

Linda S. Clark, B.Mus., has been a licensed Brain Gym® instructor since 1990. Linda serves on the Canadian Association of Specialized Kinesiology Board of Directors and is past President of the Energy Kinesiology Association (USA). Linda is an accomplished pianist and passionate about helping people perform at their best, in every walk of life. She combines her experience as a performer and teacher to create lively, participatory and practical presentations. Linda has presented Brain Gym® workshops and keynote events for a variety of private and professional groups in Ontario and the USA, including Trent University, St. Lawrence College, Oberlin College, New Mexico State University, YWCA, Peterborough AIDS Resource Network, Cooperators Insurance, Senior Centre Kingston, CFB Trenton, and various school boards.



**Break - Room:** *Ballroom Foyer - 3rd Floor*

**10:30 AM - 10:45 AM**



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# 2010 Fall Conference and Financial Fitness Forum

## CONFERENCE AGENDA

### DAY THREE: Friday, October 8

Conference Session 10 - Room: Salon B - 3rd Floor

#### **Achieve More: Taking Charge of Credit**

It is fundamental for Financial Counselling practitioners to be aware of Credit Bureau information and how Credit Bureau scores are developed, trends in credit reporting, how the health of a Credit Report impacts Consumers and the key steps that Consumers can take to bolster their Credit Report and Bureau Score. Through this session you will acquire a deeper understanding of these matters.

Hear from Tom Reid about credit reporting, factors impacting a credit score and tips to enhance client financial behaviour. Gain tools to more effectively assist your clients and become aware of the resources available to help improve financial literacy, empower individuals to make informed credit decisions and defend against identity crimes plus achieve more from the wise use of credit.

Tom Reid is the Director of Consumer Solutions at TransUnion. In his role, Tom's primary responsibility is building and managing TransUnion's Direct to Consumer business to provide tools, resources and education to help individuals manage their credit health and achieve their financial goals.

10:45 AM - 12:00 PM



Conference Session 11 - Room: Salon B - 3rd Floor

#### **FCAC: Helping Consumers Manage Their Debt**

Join Lyse Laramée from the Financial Consumer Agency of Canada (FCAC) and learn about newly released publications and budgeting tools that are available to help your clients and new homeowners to better manage their finances.

12:00 PM - 1:00 PM



Conference Ends

1:00 PM



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## A SPECIAL THANK YOU TO OUR SPONSORS

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## REGISTRATION FORM

Please complete one registration form for each registrant and check ✓ your conference package selection below.

Register by FAX to the OACCS at ☎ 905-945-4680

or by scanned Email to ✉ [wmoores@indebt.org](mailto:wmoores@indebt.org)

### Financial Fitness Forum

#### October 6<sup>th</sup>

- Financial Literacy and Beyond!
- Keynote: Laughter is the Best Medicine
- Legal Clinic
- Rookies and Rockstars
- Networking for Professionals

#### October 7<sup>th</sup>

- Keynote: Stopping Overshopping - A Workshop for Credit Counsellors and Financial Coaching Professionals
- Counsellor Certification Awards Luncheon and Keynote Speaker
- CyberCounselling Workshop for Counsellors
- Networking for Professionals

#### October 8<sup>th</sup>

- Keynote: Moving from Stress to Success - Ease Up! Stress Release Strategies from Educational Kinesiology
- Achieve More: Taking Charge of Credit
- FCAC: Helping Consumers Manage Their Debt

*Please Print*

**Registrant Name:** \_\_\_\_\_  
(as you would like it to appear on your name tag)

**Title:** \_\_\_\_\_

**Organization:** \_\_\_\_\_

**Tel** ☎ : \_\_\_\_\_

**Fax** ☎ : \_\_\_\_\_

**Email** ✉ : \_\_\_\_\_

### Your full conference registration includes:

- Four refreshment breaks
- Two breakfasts
- Two lunches
- Conference Kits and Materials

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**Continuing Education  
Units Available**

### Please send cheque payable to:

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P.O. Box 189  
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### For inquiries or to pay with credit card, please contact:

William Moores  
**Tel** ☎ : 905-945-5644 ext. 221  
**Email** ✉ : [wmoores@indebt.org](mailto:wmoores@indebt.org)

**To register a room with the Radisson Admiral Hotel, contact Reservations  
by telephone: 1-800-395-7046 or: (416) 203-3333**

**Hotel Address:** 249 Queen's Quay West, Toronto ON M5J 2N5  
**Fax:** (416) 203-3100

Please Note:

- This event is a Scent Free Zone.
- Cancellations will be refunded at the rate of 50% only if received 3 weeks before the event. After that point, registration is non-refundable; however, registrant replacements will be accepted.
- CACCS / OACCS reserves the right to amend program content without notice.

### Make Your Selection

Member  
Rate

Non-Member  
Rate



**Full Conference**  
1<sup>st</sup> registrant

\$525

\$675



**Full Conference**  
2<sup>nd</sup> and subsequent  
registrants\*

\$450

\$599



**Daily Rate**  
October 6, 2010

\$195

\$225



**Daily Rate**  
October 7, 2010

\$195

\$225



**Daily Rate**  
October 8, 2010

\$195

\$225