



Beyond the conversation

Fall Education Days



Tuesday, October 21

11:00 a.m. ET

Chris Connelly
President
IDC WIN

Kick-off and IDC WIN updates

Description to follow

11:15 a.m. ET

Speaker TBD
Sun Life Financial

A fresh look at UL and staying ahead of the pack.

Embark on an insightful journey into the intricacies of Universal Life (UL) insurance. By examining the real-world benefits of UL, attendees will gain a comprehensive understanding of how this flexible insurance product works in practice, a clearer grasp of its potential and a deeper appreciation of its application to business owners.

12:00 p.m. ET

Evan Connell
Director, Engagement and Activation
Canada Life

Insurance as a philanthropic planning tool

Canada Life My Par Gift makes it easy to integrate life insurance into your clients' charitable giving strategies. With a single premium and strong legacy value, it's a simple, effective way to turn generosity into long-term impact.

12:45 p.m. ET

Josie Malandrino
Sales Director
ivari

Embracing disruption

The insurance industry is evolving, and with it is an increased need to adapt to changes in demographics, customer experience, technology, and regulation. Learn how strategies like embracing technology and focusing on educating and engaging with younger consumers can help you stay ahead of the curve.

1:15 p.m. ET

Craig Plumley
Senior Business Development Manager
BMO Insurance

Estate planning with BMO guaranteed investment funds

Explore how using segregated funds in estate planning can create an opportunity to deepen client trust and help you build stronger relationships. Discover what's new in 2025 for BMO segregated funds, including case studies designed to drive more referrals and more generate business.

1:45 p.m. ET

Brant Tomie
Director, Insurance Sales
Equitable Life

Five reasons why participating life insurance is a unique asset class

Discover five compelling reasons why high-net-worth clients should integrate participating insurance into their portfolios. You will explore a proven strategy for positioning participating insurance, gain insights into the current marketplace, understand the distinctions between stock and mutual insurance companies, and discover how these differences can impact the values of participating life insurance.

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Beyond the conversation

Fall Education Days



Tuesday, October 21

2:15 p.m. ET

Joe Belec
RVP, Northern Alberta and Manitoba
CPP | Foresters

Take your sales to the max

Get to know Foresters' newest product, Advantage Max Participating Whole Life Insurance. Learn how to position it in the market through practical case studies and gain insights on how to win the minds, hearts and business of your prospects.

2:45 p.m. ET

Michael Gau
CEO and Founder, Win Succession
IDC WIN

Beyond the conversation: Planning for what's next

The LOU initiative goes beyond day-to-day discussions — it's about setting advisors up for long-term success through thoughtful succession planning. Whether you're preparing for the next chapter or helping clients through transition, this initiative provides the tools and support to move from conversation to action — and build a legacy that lasts.

3:15 p.m. ET

End of Day 1



Beyond the conversation

Fall Education Days



Wednesday, October 22

11:00 a.m. ET

Hemal Balsara CPA, CA, TEP, FEA
Head of Tax, Retirement and Estate Planning
Manulife

Beyond the horizon: Advanced postmortem planning

While tax deferral through a corporation has allowed entrepreneurs to maximize cash and minimize personal taxes, business owners can still face double/triple postmortem taxation. This comprehensive session will help you understand the causes behind double/triple taxation and why postmortem planning combined with life insurance can be a solution to manage terminal tax obligations, as well as how to navigate changes in capital gains and other related rules.

11:45 a.m. ET

Santo Filice
Senior Sales Consultant, Wealth and
Retirement Solutions
RBC Insurance

Seg funds and suitability: Reflecting on bias in planning conversations

Take a fresh look at how segregated funds fit into estate and risk planning discussions. Through relatable case studies, you'll explore the unique benefits seg funds can offer—particularly around probate, privacy and beneficiary designations—and how to avoid letting personal preferences, past experiences or perceived client objections unintentionally shape recommendations.

12:15 p.m. ET

David Sutton GBA
VP, National Accounts and MGAs
The Edge Benefits

Digital marketing: Accessing your clients like never before

With advisor attention pulled in so many directions, many do not have the time or the tools to effectively offer or enroll clients in living benefit products such as disability and critical illness. EDGE's new digital marketing tool can help you connect with clients to offer living benefit products on a simplified basis. Explore how the tool's end-to-end online fulfillment process combined with the easiest enrollment process in the industry make it a great tool to leverage for large groups or associations.

12:45 p.m. ET

Ian Kerr
Account Executive, Retail Investments
Distribution
Empire Life

Take a second look at Empire Life's latest GIF

Get to know Empire Life's newest GIF—and Canada's first segregated fund Registered Disability Savings Plan (RDSP). Explore Empire Life's seg fund offering and hear the top five reasons why advisors are choosing Empire Life for their seg fund business.



Beyond the conversation

Fall Education Days



Wednesday, October 22

1:15 p.m. ET

Brent Swatuk

RVP of Sales, Ontario and Atlantic Canada
Desjardins Insurance

Flatten the tax for corporate clients

Help corporate clients recover wealth they've been unknowingly losing through unnecessary taxation. Uncover a strategy that enables them to better manage their tax obligations, ease the burden of the small business tax grind, retain more assets on their balance sheet and grow their estate for future generations.

1:45 p.m. ET

Déry Veilleux

Senior Director, Strategy and Analytics,
Underwriting, New Business and Claims
iA Financial Group

AI-powered underwriting: From insight to impact

Discover how AI is reshaping underwriting processes to deliver faster, more accurate and personalized solutions. Learn how these advances enhance the client experience, build trust and drive business growth. Explore iA Financial Group's pioneering initiatives in AI, gain insight into the future of insurance and learn how AI can impact your advisory practice.

2:15 p.m. ET

Jennifer Koshul

Director of Business Development, Individual
Insurance
Assumption Life

Life is NOT a fairytale

As individuals, we often dream of "happily ever afters," but real life is full of plot twists. Let's go on a journey to explore how you can protect your clients through every chapter of their story – not just the ending. From dragons like disability and critical illness to unexpected detours like divorce, this session will equip you with tools to offer living benefits for your client's evolving story.

2:45 p.m. ET

Andrew Gardiner

Sr. Regional Sales Director, SW Ontario
Beneva

Discover the full range of Beneva's savings and investments offering

Honing your Unique Value Proposition (UVP) is essential for life-licensed brokers to stand out in today's competitive wealth management landscape. By demonstrating your ability to guide clients through their entire financial journey, you gain a powerful advantage over other Canadian advisors. This session will explore practical strategies for communicating your unique strengths and show how Beneva's savings and investment platform can help you deliver on your promises to clients and prospects.

3:15 p.m. ET

Eric Wachtel

National Chief Compliance Officer
IDC WIN

Strengthening compliance through advisor practice reviews

Advisor Practice Reviews (APRs) are more than just a checklist — they're an essential part of maintaining high standards and ensuring compliance in your practice. Discover how APRs can provide valuable insights, identify opportunities, address gaps, and uphold regulatory requirements with confidence. With APRs, compliance becomes a proactive, ongoing dialogue that protects both you and your clients while fostering trust and professionalism.

4:00 p.m. ET

End of Day 2