

LAUNCH 2025

FOCUSED ON WHAT MATTERS TO YOU



Wednesday, January 22

11:30 a.m.

Chris Connelly
Executive Vice President, Strategy and
Advisor Experience
IDC WIN

Welcome message

Phil Marsillo
President and Chief Executive Officer
IDC WIN

Town hall

Wendy Keruzore
National Digital Sales and Marketing
Specialist
IDC WIN

Operations update

12:00 p.m.

Eric Wachtel
National Chief Compliance Officer
IDC WIN

Understanding compliance audit frameworks in 2025 and beyond

IDC WIN Chief Compliance Officer Eric Wachtel will take you through the current compliance audit landscape and alert you to what's new for 2025 to help you get prepared.

12:30 p.m.

Dominic Villeneuve
Director, Cybersecurity and Infrastructure
UV Insurance

Making the most out of AI

This session will help you fully understand how to use artificial intelligence in the context of your work, while avoiding the pitfalls, risks of breach of confidentiality, fraud and threats that AI can generate. We'll talk about the different sources of information and the types of information that you can share to ensure compliance with regulatory requirements.

1:15 p.m.

Todd Straus
Director of Sales, Individual Life Insurance
iA Financial Group

The shared ownership strategy

In this presentation, we will discuss structuring and the relevant benefits of the shared ownership concept and corporately owned critical illness plans in general. We will further discuss who this strategy is suitable for and when alternative strategies can be considered.

1:45 p.m.

Alex Chan
Regional Wealth Leader, Canada West
IDC WIN

Part 1: Seg funds for all! Exploring the why's for your retail and corporate clients

A closer look into the key reasons why you should be having the Seg Fund talk with all of your clients! Alex and Graeme will be providing the key reasons "Why for 2025" for both your individual and corporate client discussions.

Graeme Allan
Regional Wealth Leader, Canada East
IDC WIN

Part 2: Corporate investing strategies

Many incorporated professionals and small business owners have cash accumulated in their OpCo or HoldCo. These two wealth strategies are tax-efficient ways to use these assets today to accumulate personal wealth or form a part of your estate planning objectives.

2:15 p.m.

Mike Liem
Account Executive
Empire Life

Enabling advisors through artificial intelligence

AI refers to a type of artificial intelligence that creates new content based on input data or prompts. It allows for automation in various tasks and can be particularly useful for advisors in tasks like generating reports, analyzing market trends, communicating with clients and providing personalized financial insights.

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2:45 p.m.

Michael Gau
Founder and CEO
Win Succession

Are you ready: The advisor succession program

Prepare for the future of your practice with the "Are you ready?" Advisor Succession and Retirement Toolkit. This essential resource helps financial advisors plan for retirement and navigate the complexities of transitioning their business. Ensure a smooth succession, protect client relationships and maximize the value of your practice—all while securing your financial future.

3:15 p.m.

Santo Filice
Senior Sales Consultant, Wealth
RBC Investments

Are your clients ready for retirement?

Getting ready to retire can bring a huge shift in your clients' life. For years, they have been working and saving for different financial goals. They have been travelling a familiar road with a specific, yet unseen destination in mind: their retirement. Now, the off-ramp comes into view and they may find themselves asking, "How do I go from what I've been doing for 30+ years to what I've dreamt of doing after I retire?"

At the same time, they are making a transition from saving to spending their savings. This raises more questions, such as:

- How do I create a stable, tax-efficient income after I retire?
 - How do I create enough income to last my whole lifetime?
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3:45 p.m.

Corrado Tiralongo
Chief Investment Officer
Canada Life

Thriving through change: 2025 economic outlook

Shifting policy rates, unpredictable economic growth and rising geopolitical tensions dominated investors' concerns in 2024. So, what do you need to know to thrive through the changing investment landscape in 2025?

Gain clarity and confidence with insights from top industry expert, Corrado Tiralongo, Chief Investment Officer, Canada Life Investment Management Ltd. Corrado will provide a strategic perspective on potential market trends in 2025 and break down key issues that may affect the North American and global economy. You will also have a chance to ask questions and get expert insight to help you achieve your financial goals. Don't miss out on the chance to empower your investment journey.

4:30 p.m.

End of Day 1

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Thursday, January 23

11:30 a.m.

Greg Osmak
Executive Vice President, Sales and
Marketing
IDC WIN

Welcome message

Karen Cutler
VP, Head of Underwriting and Chief
Underwriter Individual Insurance Canada
Manulife

Underwriting evolution: Tools and resources for 2025

In this session, we will update you on new approaches and processes being used to manage risk, improve advisor experience and move business forward.

12:15 p.m.

Marni Hefner
Director, Workplace Solutions
IDC WIN

Adapt or Die: The crucial shift to stay relevant in today's world

The future of group benefits is rapidly evolving, and the ability to adapt is no longer optional—it's essential for survival. As businesses and organizations navigate shifting employee expectations, regulatory changes and economic pressures, adapting benefit plans to meet new demands is critical to staying competitive and relevant in the marketplace.

In this insightful webinar, we will explore case studies showcasing how to successfully design group benefits plans that will allow your clients to thrive into the future. This session will provide a deep dive into the strategies that are shaping the benefits landscape for 2025 and beyond. Don't miss this opportunity to learn how to adapt, innovate and design benefits that will drive your success in 2025!

12:45 p.m.

Stuart Dollar
Director, Insurance Tax Solutions, Retail
Advice and Solutions
Sun Life

Post-mortem planning with life insurance

When the shareholder of an incorporated business dies, there is a potential for double taxation. The shareholder is deemed to have disposed of their shares immediately before death, thereby triggering a potential capital gain. If their estate has the corporation redeem the shares or wind up the corporation, the proceeds are treated as a dividend. There are two strategies for eliminating one level of tax – loss carryback to eliminate the capital gains tax and pipeline to eliminate the dividend tax. Each strategy has its pros and cons, and each can be enhanced with corporate-owned life insurance.

1:15 p.m.

Chris Britton
Director of Estate and Tax Planning
IDC WIN

Quick hits from the Tax and Estate Planning team

Advanced estate planning is one of the biggest opportunities that advisors have today! Join Chris and Brad as they share hot topics surrounding advance estate planning such as capital gain inclusion rate changes and insurance lending arrangements.

Brad Hyde
Director Tax and Estate Planning
IDC WIN

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1:45 p.m.

Joseph Trozzo
Investment Sales Vice President, MGA
Equitable Life

Dave Irwin
AVP External Fund Management
Equitable Life

When we grow together, success is mutual

At Equitable, we believe that when we grow together, success is mutual. Discover the unique product solutions and tools that have benefited many advisors in helping their clients establish a savings plan. We will also address the current economic climate and provide insight on the economic forecast. Join us to learn how Equitable can make a positive contribution to your business.

2:15 p.m.

Gregory Young
Regional Vice President, Business
Development
BMO Life

Unleashing Rovr AI: Explore. Uncover. Assist.

As a first-of-its-kind digital assistant in the Canadian individual life insurance industry, BMO's AI-driven solution streamlines the field underwriting process by delivering instant access to critical information that empowers advisors to help address their clients' insurance needs. By reducing the time spent on complex queries and document searches, this AI solution helps speed up the field underwriting process. This is the start of the evolution for advisors.

2:45 p.m.

Vic Raye
National Director, Banking Services
IDC WIN

Andrew Cairns
National Lead, Wealth Management
HomeEquity Bank

Ryan Armstrong
Business Development Manager, Wealth
HomeEquity Bank

Reverse mortgage referrals: Estate planning + total family life insurance catalyst

Please join Vic, Andrew and Ryan as they discuss:

- How your practice can benefit from the impressive growth in the reverse mortgage market, far beyond the referral commissions
- Why 60% of CHIP cases can and should be placed through you
- How your practice can benefit from the impressive growth in the reverse mortgage market, far beyond the referral commissions
- How your clients can benefit from their flagship CHIP Reverse Mortgage
- The innovative ways financial advisors are utilizing CHIP

3:15 p.m.

Thomas Deans
Intergenerational Wealth Expert

The Happy Inheritor

In this session, Tom Deans will share how families can begin a new tradition of financial openness and design family meetings that are the centerpiece of a wealth transfer plan built with kindness, care and joy. Family meetings are essential for preparing heirs and for deepening family connection. Tom will also discuss the dangers of waiting for an inheritance that may never arrive.

4:15 p.m.

End of Day 2
