

MOMENTUM 2026: ADVISOR KICKOFF

Focused on what matters to you



Thursday, January 15

1:00 – 1:20 p.m. ET

Chris Connelly

President

IDC Worldsource Insurance
Network Inc.

Momentum 2026: Relevant updates for the year ahead

Discover our strategic priorities, upcoming conference dates and location and key initiatives designed to help drive your business forward. We will also explore the evolving regulatory landscape and what these changes mean for your business so you can stay ahead, adapt confidently and turn challenges into competitive advantage. This timely session sets the stage for the coming year and equips you with the knowledge to lead in today's dynamic environment.

1:20 – 2:00 p.m. ET

Dr. Laura Rosella

Professor

Dalla Lana School of Public Health
University of Toronto

Longevity and health: What the trends mean for insurance planning

Dr. Laura Rosella will dive into trends in longevity and health across Canada, highlighting how these influence Canadians' views on long-term well-being. You will walk away better equipped to navigate client conversations around healthspan and lifespan, allowing you to deliver greater value and position your business to meet evolving expectations.

2:00 – 2:50 p.m. ET

Dylan Smith

Founder and Chief Economist
arcMacro

The road ahead: What Canada's economic trends mean for your strategy

Learn how to navigate today's volatile market with Dylan Smith's economic outlook. He will break down the forces shaping growth, inflation and interest rates, and what they signal for 2026 and beyond. This session delivers practical insights to help you guide clients with confidence, plan strategically and seize opportunities in an environment where every decision counts. Understanding these trends now is crucial to making informed choices in the months ahead.

2:50 – 3:00 p.m. ET

Break

3:00 p.m. ET

Andrew Au

President and

Digital Transformation Expert
Intercept Group

Navigating digital transformation: Reinventing sales and client engagement

Digital transformation is reshaping how we connect with clients, rewriting the rules of relationships and engagement. Salespeople face a new reality: today's buyers have more information than ever, but less time to make sense of it all. Andrew Au, recognized by Forbes as a leading digital transformation expert, will share how we can rethink their approach to client engagement and sales in this digital era. Drawing on his experience with global brands like Microsoft, FedEx and 3M, Andrew will reveal practical frameworks to modernize processes, accelerate innovation and create meaningful connections. Walk away with insights your teams can apply immediately to drive growth and stay competitive in an increasingly connected world.

4:00 p.m. ET

Closing remarks