

Tuesday September 19

7:30am	<i>Breakfast sponsored by RWAM</i>
8:30am	<p>Design for Health - Understanding the impacts of the pandemic on mental disorders and chronic conditions</p> <p>Leveraging data across Sun Life's block of business, this presentation will look at paramedical and drug claiming trends over the last several years. We'll dive deeper into insights around chronic disease, comorbidities, mental health and women's health. We'll also discuss the growing importance of benefits to support plan members belonging to diverse groups and the profound impact we've seen gender affirmation and family building coverage play in plan members' lives.</p> <p>Sun Life • <i>Andrea Belvedere, AVP, Digital Experience & Product Development</i></p>
9:15am	<p>Panel Discussion: Navigating the Post-Goldilocks Era</p> <p>In this dynamic panel discussion, two industry leaders; T. Rowe Price Portfolio Specialist Matthew Ko, CFA and Justin Truong of Mackenzie Investments will discuss how the investing landscape has shifted, the potential impact to investor's portfolios, and what signals investors should look for that may trigger additional updates to their portfolios. Making asset allocation decisions amid rapid change and increased market volatility requires a global perspective and a strategic discipline. We look forward to a very informative and interactive session to hear their perspectives.</p> <p>T.Rowe Price • <i>Matthew Ko, CFA, Portfolio Specialist</i> & Mackenzie Investments • <i>Justin Truong, Investment Strategist,</i></p>
10:15am	Networking Break
10:45am	<p>Disability Innovation: Past, Present & Future and What it Means for Advisors and Plan Sponsors</p> <p>This session will discuss disability innovation at Manulife and how this relates to plan member health / experience, plan sponsor experience and advisor experience.</p> <p>Manulife • <i>Cori Lawson-Roberts, AVP, Disability Innovation and Integrity, Manulife Group Benefits.</i></p>
11:10am	<p>Extension of EI Benefit Duration – What's Your Vote?</p> <p>Effective December 18th, 2022, EI Canada extended the payout period for accident and sickness benefits to 26 weeks. In this session, we will recap the change implemented to this government sponsored benefit and explore the immediate impact this has had on private disability plans and related claim adjudication processes. The session will round out with a deeper dive into the potential pricing complexities that may start to emerge in the market as we gain more post change claims history. Has this been a good change? You will be provided with the opportunity to share your thoughts and cast your vote!</p> <p>Empire Life • <i>Tammy Phelps, RVP, National Accounts</i></p>
11:35am	<p>The Evolution of Disability Management</p> <p>Approaches to disability claims management have progressed exponentially over the last 5 years, after decades of stagnation. In this session, attendees will learn about new approaches to minimize plan member absence – and the philosophy necessary to optimize results.</p> <p>Holden & Associates Consulting Inc. • <i>Julie Holden, President</i></p>
12:00pm	A Conversation with <i>Cori Lawson-Roberts, Tammy Phelps, and Julie Holden</i>
12:15pm	<i>Lunch sponsored by Aurora</i>
1:15pm	<p>Active Investment Management – Global Perspective and Local Application</p> <p>CI GAM to provide an informative perspective around concepts and best practices as it applies to structural organization of active investment management platforms globally. The session will also provide an update to how CI GAM is putting some of the best practices to work in structuring one of the broadest, independent Canadian investment management platforms and positioning for future success.</p> <p>CI Global Asset Management • <i>Marc-Andre Lewis, Executive Vice-President & Chief Investment Officer</i> & <i>Bran Kalmar, CFA, Vice-President & Head of Institutional</i></p>
1:45pm	<p>CONNECT with Creating and Leveraging Your Client Value Proposition</p> <p>You likely already have a value proposition built. How did you build it? Join us in a fireside chat as Andrea Hansen talks us through exactly how she built the value proposition in a very unique way for Sutton Benefits & Pension. Then, learn how her team leverages this with existing clients, and how they attract new clients to drive meaningful long-term growth!</p> <p>Sutton Benefits & Pension • <i>Andrea Hansen, President</i></p>
2:15pm	Networking Break
2:45pm	<p>PLAs: Netting Out the 3 Key Benefits for Your Customers</p> <p>PLAs are becoming more commonplace with Canadian Private insurers yet there remain many questions on how they benefit the plan sponsor. The objective of this presentation will be to provide the audience with a brief overview of PLAs in the Canadian private health benefit market and net out the 3 key points that advisors can communicate to their customers on why PLAs provide a benefit to the plan.</p> <p>JANSSEN • <i>Kevin O'Connor, National Director, Private Payors</i></p>
3:15pm	<p>Unleashing Your Greatness</p> <p>Buhle (Boo-slay) Dlamini helps you to unleash your greatness by focusing on what sets you apart in a crowded marketplace. It will help you to discover how to stand out and reach your full potential as an individual, team or an organization. Greatness is not only the reserve of a few; individuals and teams who focus on these keys can unleash their greatness. This is an entertaining and inspirational talk that will set a higher standard for success and performance and help you turn your values into behaviors that drive culture. You will leave completely motivated with practical tools to be great!</p> <p>Buhle Dlamini</p> <p><i>Keynote Sponsored by MFS</i></p>
4:30pm	Conference Wrap Up

Presented by:

