



## Our vision

Leadership in innovative advanced planning solutions and advocacy to promote the financial health of Canadians



## Our mission

CALU promotes a deeper understanding of complex financial and tax initiatives for members and clients and advocates for sound public policy

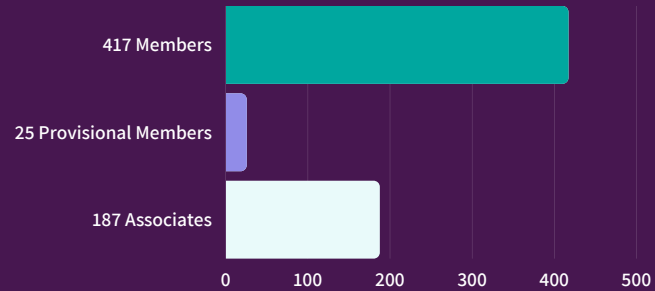
## Our year in numbers

### Driven by our members

**16**  
Volunteer committees



**629** <sup>2021</sup>  
Members



### Professional development



**2**  
National conferences



**2**  
Webinars



**30**  
On-demand webinars



**28**  
Continuing Education (CE) credits

**800+** people attended CALU's learning programs



Twitter followers: **295**  
↑ 73% during the year



LinkedIn followers: **889**  
↑ 69% during the year

### Advocacy

**21** meetings with Finance Canada and other federal government and Parliamentary officials

**9** submissions on federal tax and other policy and regulatory issues

**9** opportunities to share advocacy messaging courtesy of third party media and social media channels

**12 more than in 2021!**

### Tools & resources



**42**  
News & Updates



**5**  
CALU Reports



**5**  
CALU Special Reports



**4**  
Issues of *INFOexchange*



**1**  
Practice Note

# Delivering on our mandate

Advocating for sound public policy and creating a supportive community for our members to learn, grow and share ideas

## Achievements under our 5 Strategic Pillars

### Public policy & advocacy

Engaged in advocacy by way of an approach that is nonpartisan, collaborative and informed by sound analysis and technical expertise. CALU influenced many federal tax and public policy issues and initiatives including:

- The 2022 and 2023 Budgets
- Intergenerational business transfers
- Underused Housing Tax (UHT)
- Health and Welfare Trusts (HWT)
- Private Health Services Plan (PHSP) limits
- Submissions relating to specific Canada Revenue Agency (CRA) technical interpretations
- The CRA-Finance Roundtable at the 2022 Conference & AGM
- Life insurance in life insurance trusts

We also improved our advocacy program by:

- Updating our government relations strategy
- Emphasizing the importance of grassroots advocacy

### Addressing disruption

Helped members navigate industry and regulatory change by engaging on issues such as:

- Incentive Management Guidance
- Mandatory disclosure rules
- Notifiable transactions

### Branding & communications

Improved outreach and communications to members and external audiences by:

- Increasing our presence on social media
- Publicly sharing submissions to governments
- Making more information available to members
- Improving integration with advocacy initiatives
- Updating our communications strategy

### Member experience

Redoubled membership recruitment and retention efforts in response to demographic and industry trends and preferences by:

- Delivering a highly successful in person Conference & AGM in May — the first in three years
- Providing online learning opportunities including a fall conference and webinars
- Offering a guest program at both conferences
- Introducing onboarding through regular orientation sessions for new members and an Ambassador program for first timers at the 2022 spring conference
- Launching a mentorship program
- Restructuring and streamlining the Committee structure

### Innovation & efficiency

Improved CALU's online presence and strengthened opportunities for partnership and efficiencies by:

- Furthering CALU's relationship with Advocis, including through a biennial joint Board meeting
- Reorganizing publications and submissions in members only website improving the user experience
- Moving government relations and communications functions in house