



2023 Year in review

Our mission



To advocate for sound public policy and provide advanced education to leading life insurance and financial advisors so they can protect and improve the financial well-being of Canadians and family businesses.

Our vision



We are the leading resource for advanced planning knowledge for our members and government.

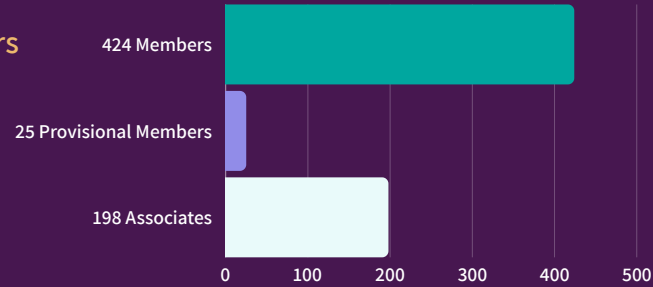
Our year in numbers

Driven by our members

18
Volunteer committees



60 new members
647 ²⁰²²
Members



Professional development



2
Major conferences



2
Live webinars

740 individuals attended CALU's learning programs



20
On-demand webinars



30
Educational sessions



LinkedIn followers: **1,338**
↑ 50% during the year



X followers: **386**
↑ 31% during the year

Advocacy

28 meetings with Finance Canada & CRA and other federal government and Parliamentary officials

11 submissions on federal tax and other policy and regulatory issues

18 interviews and opportunities to advocate for CALU positions in leading news, business and trade media

Tools & resources



43
News & Updates

66% open rate



4
CALU Reports



4
Issues of INFOexchange



4
CALU Practice Notes



3
CALU Special Reports



Member satisfaction

89% of member survey respondents satisfied with CALU (up from 87% in 2020).

Delivering on our mandate

Advocating for sound public policy and creating a supportive community where our members can learn and share ideas to enhance the financial well-being of Canadians.

Key achievements in 2023

Events and learning

Provided events and learning opportunities on emerging tax, planning and technical application issues by:

- Delivering a highly rated Conference and AGM attended by 450 participants
- Launching a new high-quality learning event – the Advanced Education Symposium (AES)
- Providing the latest publications, research and practices needed for success
- Issuing CE credits for two additional jurisdictions and agencies across Canada
- Increasing CALU's social media presence to better reach potential audiences for event and learning opportunities
- Promoting and offering major learning events to prospective members



Advocacy and public policy

Engaged in federal advocacy by way of a nonpartisan and collaborative approach informed by sound analysis and technical expertise. CALU engaged and shaped many tax and public policy issues and initiatives including:

- The 2023 and 2024 federal budgets
- Intergenerational business transfers
- Alternative Minimum Tax (AMT)
- Dividend Received Deduction (DRD)
- Canadian Dental Care Plan (CDCP)
- Registered Retirement Income Funds (RRIFs)
- Underused Housing Tax (UHT)



Deepened relationships with government officials and Parliamentarians from across the political spectrum to increase awareness about CALU and our role as a trusted advisor.

Community and engagement

Provided a collaborative community to members helping them connect, stay informed, and turn ideas into action by:

- Renewing the pilot mentorship program and extending eligibility to Associates
- Conducting a member survey to better understand and meet member expectations
- Updating the Strategic Plan to provide new organizational direction and goals until 2026
- Onboarding new members through orientation sessions and first timers at the Annual Conference & AGM through an Ambassador program
- Expanding outreach with partners and collaborators such as the Advocis Schools
- Announcing a new pilot microlearning webinar series on specific areas of advanced planning



Learn more about who we are and what we do at [CALU.com](https://www.calu.com)

