



STRATEGIC PLAN

A community of engaged members

2023 - 2026



The Conference for Advanced Life Underwriting

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.

Member Value Proposition

Elevate your practice by joining the leaders in the life insurance and financial advisory community, sharing unique tax planning and insurance-based knowledge and advocating for sound public policy.



Strategic Goals

Goal 1:



Public Policy and Advocacy

- 1.1 Increase member knowledge and engagement on advocacy issues, including grassroots advocacy.
- 1.2 Produce and use more evidence-based materials such as data and research to support advocacy activities.

Goal 2:



Education

- 2.1 Improve CALU's longstanding professional development and education initiatives, including the Annual Conference, to increase member engagement and participation.
- 2.2 Provide innovative education offerings to respond to evolving member needs and preferences.

Goal 3:



Membership

- 3.1 Recruit new members while improving diversity.
- 3.2 Maximize retention of current members by delivering a strong and inclusive member value proposition.

Goal 4:



Financial Sustainability

- 4.1 Plan for and mitigate against the potential loss or significant reduction in traditional sources of funding.
- 4.2 Explore different revenue models and ensure the prudent management of expenses.

Goal 5:



Governance

- 5.1 Develop a formal succession plan for the:
a) Committee Chairs b) Directors and Officers c) President & CEO
- 5.2 Develop a risk management framework.