



# 2024 Year in review



**Our Vision:** We are the leading resource for advanced planning knowledge for our members and government



**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 year in numbers

### Driven by our members

**651** Members

**14** Committees and other groups

**99** Volunteers



**62** New members



**91%** Retention rate



**49** Weekly newsletters

67% open rate



**13** CALU Special Reports and issue briefings



**6** Tools & resources  
Corporate publications



**4** CALU Reports



**4** Issues of INFOexchange



**1** Practice Note

### Advocacy



- 26** meetings with Finance Canada & CRA and other federal government and Parliamentary officials
- 9** submissions on federal tax and other policy and other policy issues
- 16** interviews and opportunities to advocate for CALU positions in leading news, business and trade media



LinkedIn followers: **1,835**  
~40% ↑ from 2023  
106% ↑ from 2022



X followers: **438**  
~15% ↑ from 2023  
~50% ↑ from 2022

### Professional development

**2** Major conferences

**2** CE-eligible webinars

**5** Microlearning webinars

**39** Educational sessions

**!** 1,000+ attendees at CALU's learning programs : ~40% more than last year!



# Delivering on our mandate

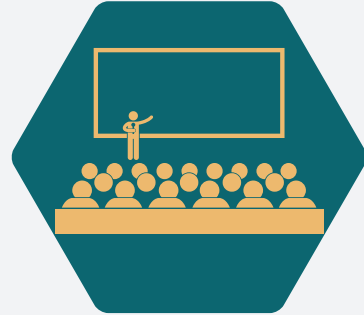
Advocating for sound public policy and creating a supportive community where our members can learn and share ideas to enhance the financial well-being of Canadians

## Key achievements in 2024

### Events and learning

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

- Delivering an highly successful Conference & AGM including a record setting 500 + in person participants and a new sponsorship program
- Providing another major event – the Advanced Education Symposium (AES) – for a second year to 200 + hybrid attendees and high approval ratings
- Growing the number of jurisdictions and agencies from which we issue CE credits– 9 in total
- Launching CALU Connect – a new pilot microlearning webinar series on specific areas of advanced planning
- Expanding CALU’s reach to potential audiences through growth in social media and newsletter metrics
- Attracting more CALU prospective members to in person and online learning events



### 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 2024 and 2025 federal budgets
- Capital gains inclusion rule changes
- Intergenerational business transfers
- Alternative Minimum Tax (AMT)
- Employee Ownership Trusts (EOT)
- Housing tax measures
- Dental care and pharmacare

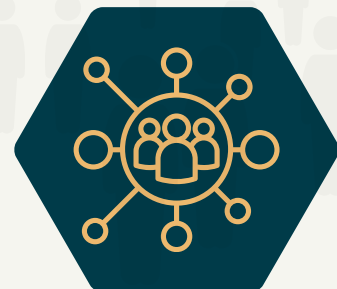


Deepened relationships with government officials and Parliamentarians from across the political spectrum to increase awareness about CALU and our role as a trusted advisor.

### Community and engagement

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

- Streamlining the Committee structure and creating a new Resource Group as an alternative way to leverage volunteer engagement and expertise
- Renewing the mentorship program following high satisfaction ratings from participants
- Establishing a Task Force for the customary review of the Advocis membership requirement including broad opportunities for engagement
- Ongoing onboarding of new members through orientation sessions
- Continued outreach and engagement with partners and collaborators such the Advocis Schools



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

[calu@calu.com](mailto:calu@calu.com) |  [x.com/calucanada](https://x.com/calucanada) |  [linkedin.com/company/calucanada](https://linkedin.com/company/calucanada)

