

## About CALU

CALU is Canada's national association for leaders in the life insurance and financial advisory industry. We provide our 650+ members with high-quality education and with opportunities to connect, stay informed and share ideas on how to enhance the financial well-being of Canadians.

Advocacy is an important part of our mandate. Along with our partner association, Advocis, CALU speaks for thousands of insurance and financial advisors in every part of Canada to grow and preserve the financial well-being of Canadians and family businesses.

### 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.



### A national community of expertise

Individuals and small business owners across Canada rely on our members to help protect and secure their financial futures. Our members serve their clients with specialized services in areas including:

- life insurance
- tax and estate planning
- business succession
- retirement planning
- employee benefits
- living benefits such as disability and critical illness
- philanthropy and charitable giving strategies



### Advocating for sound public policy

For over 30 years, CALU has engaged in public policy advocacy for the benefit of individual Canadians and the small business community, and to impact public policy discourse. Our approach is nonpartisan, collaborative and informed by sound analysis and technical expertise.

Our current public policy priorities include:

- supporting small business owners
- enhancing Canada's retirement system
- strengthening Canada's healthcare system

CALU is committed to strong relationships with federal public policy makers and is proud to be a trusted advisor to the federal government.

### Quick facts

**70%**

70% of CALU members are advisors who provide advanced life insurance, financial and business advisory services directly to clients

**30%**

of our members are accountants, lawyers, actuaries and other professionals who support advisors in the complex discipline of advanced advisory services

### About the industry

**23 million**

Canadians own life insurance for the future security of their families, totaling \$6 trillion in coverage\*

**\$143 billion**

in life insurance, health and retirement benefits were paid to Canadians in 2024\*

\* Canadian Life and Health Insurance Facts 2025 Edition, The Canadian Life and Health Insurance Association