

2025 Year in Review – Our year in numbers



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



Tools & resources

- 47** Weekly newsletters
- 14** Tax Bytes & issue briefings
- 4** Issues of INFOexchange
- 4** Corporate publications
- 3** CALU Reports
- 2** CALU Special Reports
- 1** Practice Note



Advocacy

- 20+** meetings with Finance Canada & CRA and other federal government and Parliamentary officials
- 8** submissions on federal tax and other policy issues
- 21** media references to CALU in leading mainstream and trade publications



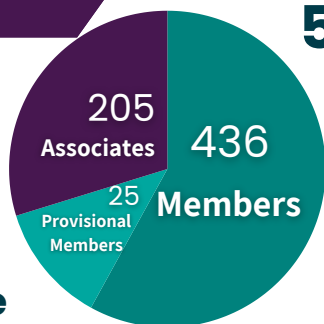
Professional development

- 2** major conferences
- 2** CE-eligible webinars
- 6** microlearning webinars
- 37** educational sessions
- 33** on-demand webinars

Driven by our members

666 members

93% retention rate



59 new members

92 volunteers

15 Committees and other groups

1,000+

attendees at our learning programs



2,185 followers
 ↑ 20% in 2025 and 145% over 3 years

470 followers
 ↑ 7% in 2025 and 60% over 3 years

Key achievements in 2025



Events & learning

Provided events and learning opportunities on technical tax and other planning issues by:

- Delivering a highly successful **Conference & AGM** that drew 500 + participants and included a new call for proposals and the renewal of our sponsorship program
- Hosting another major event – the **Advanced Education Symposium (AES)** – to 200 + hybrid attendees and high approval ratings
- Offering additional opportunities to earn CE credits through **webinars on corporate-owned life insurance**
- Developing **six sessions of CALU Connect** – a microlearning webinar series on specific advanced planning topics
- Producing a range of **publications on technical tax and other issues** – including a new “Tax Byte” for brief updates
- Supporting preferences identified through a **member education survey**



Advocacy & public policy

Engaged in federal advocacy using a non partisan and collaborative approach, backed by analysis and technical expertise by:

- Successfully advocating against the increase in the **capital gains inclusion rate** proposed in Budget 2024
- Swiftly providing recommendations to the post-election government on **immediate and longer-term tax priorities**
- Participating in **2025 pre-budget consultations** by providing recommendations on small business tax reform, RRSPs and RRIFs, and dental care and pharmacare
- Establishing and deepening **relationships with government officials and Parliamentarians** from across the political spectrum



Community & engagement

Fostered a community to help members connect, stay informed, and turn ideas into action by:

- Launching the **annual call for volunteers** earlier to allow Committees to be reconstituted and begin working sooner
- Renewing the **mentorship program** following high satisfaction ratings from past participants
- Continued **onboarding of new members** through orientation sessions
- Growing the CALU community by **inviting prospective members** to our learning events and to a new “Discover CALU” information session
- Reaffirming our **partnership with Advocis** and exploring further avenues for collaboration

