

THE FUTURE IN FOCUS

CIU 2017 AGM
Ottawa Marriott Hotel

AGENDA

SUNDAY, JUNE 4th

TIME	EVENT	LOCATION
5:00 – 6:30 PM	Opening Reception AGM Conference Registration	Sussex Salon–27 th Floor

MONDAY, JUNE 5th

7:15 – 8:00 AM	Delegate Breakfast	Victoria Ballroom South
	FALU Breakfast: By Invitation	Wellington Room - 3 rd Floor
	AGM Conference Registration	Victoria Ballroom North Foyer

8:15 – 8:30 AM OPENING GENERAL SESSION Victoria Ballroom North

Anthems:	Kirk Lackenbauer
Welcome:	Chantal Gray, CIU Chair
Greetings:	Traci Davis, AHOU, President Josée Roy, AQT-V, President

8:30 – 8:45 AM FALU AWARDS PRESENTATION

Frank Goetz, ALU President
Chantal Gray, CIU Chair
Traci Davis, AHOU President

8:45 – 9:45 AM KEYNOTE PRESENTATION

THE MILLENNIALS:

HOW THIS GENERATION IS CHANGING EVERYTHING

David Coletto, Founding Partner & CEO, ABACUS DATA

Through an engaging and interactive presentation, David gives his audience a uniquely Canadian perspective on who Canadian Millennials are, why they are so different, and what organizations need to know to manage them.

MONDAY, JUNE 5

Having conducted research on Canadian Millennials for the past six years, David's insights are research-based, balanced, and respectful. David takes his audience on a journey to understand why Millennials are the way they are, what makes them different, and how this impacts how to work with them. Using data he has collected through his research firm Abacus Data, David brings a Millennial's perspective to the challenges and opportunities Millennials are presenting to underwriters as they try to manage and engage with Canada's largest generation

9:45 – 10:15 AM Networking Break Victoria South & Foyer

10:15 – 11:00 AM INSURING HIV: READY OR NOT? Victoria Ballroom North

Jean-Marc Fix, FSA, MAAA
Vice President, Research & Development
Optimum Re Insurance Company

We have learned a lot since the cluster of 19 cases of what was to be called AIDS was identified in Los Angeles in 1982. We will do a quick overview of what is known about the HIV virus and the impact that knowledge has had on treatment and mortality. We will explore the radical changes in mortality that new treatments have brought. We will draw some possible lessons for life insurance and look at a rational approach to evaluating cases.

11:00 – 11:30 AM Networking Break Victoria South & Foyer

11:30 – 12:15 PM DATA AND ANALYTICS: AN UNDERWRITING REVOLUTION? Victoria Ballroom North

Jason Bowman, ACII, DMU(AMS)
SVP, Head, North American Underwriting Implementation Team
Swiss Reinsurance Company Ltd

Jason Bowman, Senior Vice President of Swiss Re, explores how data and analytics are being used to transform the underwriting process and how underwriters need to adapt to live in a big data world.

12:15 – 2:15 PM Lunch on Your Own

**2:00 – 2:30 PM Networking Break at the Hotel Victoria Gallery 3rd Floor Foyer
Coffee & Desserts hosted by the CIU – Join us!**

MONDAY, JUNE 5

2:30 – 3:15 PM Breakout Sessions #1, #2, #3 3rd Floor Meeting Rooms

BREAKOUT SESSION #1 Rideau Room – 3rd Floor

BLINDSPOT

Stephen Cooley, BA, FALU
Chief Administrative Officer, PartnerRe

Don't let new and changing risk creep on you. Join Stephen as he helps reduce/minimize your blindspot by discussing a variety of risk topics.

BREAKOUT SESSION #2 Wellington Room – 3rd Floor

CASE CLINIC: ENOUGH IS ENOUGH

Nadine Landry Senior Underwriting Consultant BMO Insurance	Ginette Gourd, FALU, FLMI Director, Advanced Underwriting Sun Life Financial
Audrey Carrier, BA Senior Underwriting Specialist Munich Re	

Join us for a case clinic where opinions from different perspectives will be explored. Attendees will be offered the use of Voting technology through which they will have opportunities to voice their opinions ... verifying that there is no right answer – just critical thinking of the facts.

BREAKOUT SESSION #3 Dalhousie Room – 3rd Floor

SURVIVOR: EVOLVING IN THE BROKER MARKET

Kathleen Gebotys, CLU Financial Consultant Investors Group Financial	Milan Topolovec, BA, TEP, CLU, CHS, RCIS President & CEO K Financial Group
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Hear how an experienced advisor and a millennial manage the business and how it's changed dramatically over the years.

3:15 – 3:45 Networking Break Victoria Gallery 3rd Floor

3:45 – 4:30 PM Repeat of 3 Breakout Session Presentations

#1 BLINDSPOT Stephen Cooley Rideau Room

#2 CASE CLINIC: ENOUGH IS ENOUGH Wellington Room
Nadine Landry, Ginette Gourd & Audrey Carrier

#3 SURVIVOR Kathleen Gebotys & Milan Topolovec Dalhousie Room

MONDAY, JUNE 5

5:00 – 7:00 PM CIU HOSTED RECEPTION

Summit Room – 29th Floor

**Don't Miss this Networking Get Together!
POSTCARDS FROM THE WATER'S EDGE!**

*Please join us for a Roof-Top Special Event Reception
with our Band of Entertainers ~ The Water's Edge ...
Listen, dance and enjoy the breath-taking views of our Nation's Capital...*



7:00 PM Onwards ~ Free evening to Explore Ottawa....



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AGENDA

TUESDAY, JUNE 6

(all sessions are Main Stage Presentations in Victoria Ballroom North)

7:15 – 8:00 AM EXPO Hall Delegate Breakfast Victoria Ballroom South & Foyer

7:45– 8:00 AM Conference Registration Victoria Ballroom North Foyer
CIU AGM Slide Show Victoria Ballroom North

8:00 – 8:30 AM BUSINESS SESSION Victoria Ballroom North

Chantal Gray, CIU Chair
John Duff, CIU Treasurer
Selena Puttick, CIU Past Chair

8:30 – 9:15 AM INDUSTRY KEYNOTE: Victoria Ballroom North
LEADING CHANGE IN UNDERWRITING

Karen Cutler, MBA, FALU, FLMI
Vice President & Chief Underwriter
Manulife Financial

We are approaching a major shift away from traditional underwriting. Is this change for the good? With seemingly daily advancements in medical research, necessary adaptations to regulatory change, and access to vast data through the use of analytics and new technology, we are heading to a major shift in underwriting, beneficial to both the customer and the provider. We'll talk about these changes and what this means for underwriters now and in the future, as well as what you can do to future-proof your career.

9:15 – 9:45 AM EXPO Hall Networking Break Victoria Ballroom South & Foyer

9:45 – 10:45 AM THE CONTAGION OF Victoria Ballroom North
CLIMATE CHANGE AND
HOW IT IMPACTS LIFE AND HEALTH INSURANCE

Dr. Blair Feltmate
Faculty of Environment, University of Waterloo
Head, Intact Centre on Climate Change Adaptation Project (Canada)

TUESDAY, JUNE 6

Climate change and extreme weather impacts on Property and Casualty insurance are correctly perceived to be substantial, while Life and Health insurance impacts are incorrectly considered to be negligible.

This presentation by Dr. Feltmate, addresses this misunderstanding, by highlighting how the most-costly impact of climate change in Canada – flooding houses/basements – is substantially affecting both the physical and mental health of home owners nationally. In reference to alleviating basement flood risk, it would be in the best interest of P&C and Health insurers to align in common cause.

10:45 – 11:15 AM EXPO Hall Networking Break Victoria Ballroom South & Foyer

11:15 – 12 Noon OBESITY: Victoria Ballroom North
A GROWING THREAT TO POPULATION MORTALITY

Richard Braun, MD
Vice-President & Chief Medical Officer
SCOR Global Life Americas

According to Statistics Canada, as of 2014, 54% of Canadians ages 18 and over were overweight, or obese, based on self-reported BMI. That included 61.8% of males and 46.2% of females. Trends indicate that inexpensive, calorie-dense foods combined with reductions in physical activity are creating a world-wide epidemic of obesity.

This presentation explores the epidemiology, etiology, trends, definitions, and treatment of obesity. Focus will be given to the special case of childhood and adolescent obesity. The relationship of obesity to Type 2 diabetes, Hypertension, Chronic Kidney Disease, Cancer, Respiratory Disease, and non-alcoholic fatty liver disease will also be reviewed, as will the excess mortality associated with obesity.

12:00 – 1:30 PM EXPO Hall Luncheon Victoria Ballroom South & Foyer

1:15 – 1:30 PM Join us in the EXPO Hall Victoria Ballroom South

For Prize Draws!

TUESDAY, JUNE 6

1:30 – 2:30 PM PSYCHOLOGICAL TRAUMA UNDERSTANDING AND IMPACT Victoria Ballroom North

Ash Bender, MD, FRCP(C)
Assistant Professor, Faculty of Medicine, U of T
Staff Psychiatrist, CAMH, & Co-founder, Workplace Insight

This session provides an overview of psychological trauma and its impact on individuals and organizations. Employers, with personnel at elevated risk due to job duties, are increasingly taking proactive steps regarding prevention, intervention and return to work. An approach to management will be reviewed, with a focus on reducing associated costs.

2:30 – 3:15 PM MAINTAINING KNOWLEDGE (BEYOND TRAINING) Victoria Ballroom North

Nick Durie
E-Learning Product Manager
LOGiQ3

Someone new to Underwriting cannot simply become an Underwriter without training. The vast amount of medical knowledge, inductive reasoning, and decision-making skills required takes time to develop. Competencies, (knowledge, skill, attitudes) which lead to great performance, can be taught!

However, what of the existing Underwriter? Is it the case that once trained, trained for life? What competencies are specific to an Underwriter to sustain good performance? The nature of the role, and the changing nature of medical conditions, treatments and industry changes, require learning and training to be continuous, to achieve optimal performance.

From his unique perspective, Nick provides insights into how to apply adult learning principles to ensure continuous learning occurs in the workplace.

3:15 – 3:30 PM CLOSING REMARKS

Susan Hutchison, FALU, FLMI, FLHC, ACS
CIU Chair 2017-2018

ADJOURNMENT