

Wednesday, June 10

11:00 a.m. ET

Welcome

11:05 a.m. ET

How to break out of average and be your best

Andy Kovacs, CFP®, CLU®, CHS™, EPC, CEA
Financial Planner, Sun Life
President, Moments of Truth Insurance
Services Corp.

Average is often described as “the best of the worst and the worst of the best.” Either way, it is not a winner’s target and that meant it was not good enough for [Andy Kovacs](#). A lifetime entrepreneur and one of Canada’s very few Sixth Degree Black Belts in Karate, Andy wanted more. A lot more. And he did not just wait around for it to happen either. He got the tactical coaching he needed to break out of average and start realizing his full potential.

Andy made just five changes that gave him improved focus, a unique approach, an evolved process, targeted marketing, and a very much enhanced client experience. It changed everything.

11:35 p.m. ET

Beyond benefits

Matthew W. King
Head of Group Distribution
RBC Life Insurance Company

A brief look at the current state of the industry, its changes and what RBC is doing to meet the needs of advisors and clients.

11:45 p.m. ET

Change tsunami

Aidan McCullen
Host/Founder
Edge Behaviour
The Innovation Show

In this keynote, Aidan explains how disruption behaves like a tsunami. It begins with a distant trigger such as a new competitor, a regulatory shift, or a technological breakthrough. The wave builds out of sight while everything appears normal. In some cases, profits even rise, which hides the real undercurrent of change until it is too late

Using unusual stories, Aidan shows that pattern recognition and mindset has always been one of humanity’s greatest advantages. With AI and exponential technologies increasing the tempo of change, these skills are essential.

He explores why our “change muscle” has weakened after decades of post-war stability and how we can rebuild it. A simple exponential thought experiment illustrates why waves now arrive faster than leaders expect. Aidan then introduces the Infinity Curve as a practical way to navigate ongoing reinvention.

12:45 p.m. ET

From commodity to consultant: The business case for ‘Discovery’

David Emanuel
VP and Head of Workplace Solutions
IDC WIN Workplace Solutions

Marni Hefner
Director, Business Development
IDC WIN Workplace Solutions

Today’s employers aren’t looking for another quote—they’re looking for insight. This session reveals how a discovery-led sales approach elevates advisors from vendors to trusted partners. We’ll unpack the consultative shift, walk through the four pillars of enhanced discovery, and show how turning insight into action creates stronger differentiation, deeper relationships, and sustainable growth.

Wednesday, June 10

1:15 p.m. ET

Speakers

Fraser Wiswell

Head of Global Participant Outcomes
Manulife Wealth and Retirement

Darren Sacks

CEO
BeniPlus

Jeremy McQuay

Senior Sales Consultant
BeniPlus

Gino Stirpe, CHS

Vice President
Vumi Canada

Suze Mason

Co-Founder & COO
Sprout

Jean-Marc Assad, Ph.D.

Director of Training Services &
Psychologist Psyvitaliti

Faisal Din, B.Sc.

Senior Account Executive,
Group Retirement & Savings
Co-operators

Angela Johnson

CEO & Co-Founder
sanoLiving

Design: Spotlight on benefit strategy

A rapid-fire series of 15-minute insights from leading carriers and partners on how intentional benefit design is shaping the future of group insurance.

- Manulife: Longevity — A look at how longevity trends are reshaping what it means for plan members to prepare for a 100-year life.
- BeniPlus: Beyond the spreadsheet — Using hybrid HSAs to break the renewal cycle
- Vumi Canada: Humanizing and modernizing the customer experience in international private medical insurance
- Sprout Family: Offer inclusive fertility and family-building benefits
- Psyvitaliti: Designing for resilience — Integrating cognitive behaviour therapy into today's benefit strategies
- Co-operators: Designing the right group savings plan
- sanoLiving: Sustainable benefits — Addressing what's driving costs for plan sponsor
- Empire Life: Discover. Design. Deliver. **EPOC**

3:20 p.m. ET

David Emanuel

VP and Head of Workplace Solutions
IDC WIN

Marni Hefner

Director, Business Development
Workplace Solutions

Deliver: The revenue engine advisors underuse

This session introduces 'Deliver', a disciplined post-sale operating model designed to help advisors build and protect revenue, reduce churn and increase client lifetime value. We'll focus on how ongoing delivery—not just renewal negotiations—makes advisor value visible throughout the year. Attendees will leave with a clear understanding of how disciplined delivery protects relationships, expands revenue per client and differentiates advisors beyond price.

4:00 p.m. ET

Wrap-up
