Message from the President

Robert Fellows, MBA, FCIP, CRM

It’s a pleasure to be writing my first official message following my introduction as the new Insurance Institute of Ontario President. It’s a busy time of year for the IIO—and more importantly, the 20,000 Ontario insurance professionals who make up our membership. The insurance space is always changing, and it’s an honour to be on the frontline of providing you with education and professional development options that ensure you stay current.

A great example of this is our Chartered Insurance Professional (CIP) students, who are currently preparing for fall exams. The spring exam session was the first time that computer-based exams were offered for all courses, following a multi-year transitional period. All students were able to write their exam within a three week window, and exam results came much faster than they were used to—in some cases, students received their results back in days! It’s fantastic to see the Insurance Institute utilizing digital technology to make such positive changes to the student experience.

If you are currently studying for a fall exam, I recommend our IIC Mobile Learning app. Available in the App Store and Google Play, it offers you free access to the Dictionary of Insurance and a pack of C11 practice questions, with other questions packs available for in-app purchase. I wish you all the best on your upcoming exams!

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You’re invited to these annual industry highlights

Network | Celebrate | Be Inspired

We invite you to join the insurance community’s elite—including the newest CIP and FCIP graduates, other graduates, and award winners—to commemorate educational achievements and professionalism in our industry.

Your local ceremony provides the perfect opportunity for you to make new contacts, connect with existing ones, and celebrate with the industry as our newest graduates are awarded their designations.

Three chapters celebrated convocations in November with ceremonies held in London, Ottawa, Sault Ste. Marie and Sudbury. You’re invited to celebrate and network with old and new colleagues at these upcoming ceremonies:

**Greater Toronto Area**
Thursday, January 25, 2018
Metro Toronto Convention Centre

**Hamilton/Niagara**
Wednesday, February 28, 2018
Michelangelo’s Banquet Hall

**Kawartha/Durham**
Friday, February 2, 2018
Deer Lake Golf Course

**Conestoga**
Thursday, March 1, 2018
Bingemans

To find out more and to register, please visit www.insuranceinstitute.ca and click on your local chapter web page.

Message from the President

Those of you who recently graduated as a CIP, FCIP or from one of our certificate programs such as Advanced CIP and Risk Management will have anticipated our current convocation season. Convocation events offer more than meets the eye; as well as graduation ceremonies, they offer exciting opportunities for industry-wide celebrations and networking. All are welcome to attend—even if you are not connected to our graduating class. Personally, I was honoured to be able to congratulate new graduates in the Southwestern Ontario and Ottawa chapters, and after the holiday season I’ll be travelling to other locations in Ontario to meet our newest graduates. I would like to extend my sincere congratulations on your valuable achievement and wish you all the best in future career success.

If you’re looking to enter or continue in one of our designation or certificate programs, winter registration has been open for some time now, so if you haven’t yet registered for classes, I encourage you to do so as soon as you can. The CIP designation is the benchmark of insurance education in our industry—and we offer classes in several learning modes to suit your preference and work around your time commitments.

In-class learning is well-suited to those who prefer a traditional classroom experience; statistics show classroom learning maximizes knowledge retention. If you can’t make an evening class, your local chapter may offer fast-track classes such as Weekend Warriors later on in the semester.

Our virtual learning format continues to grow in popularity with students who value a live classroom experience but prefer to do it from the location of their choice. Lastly, we also offer distance learning or independent study, for those who prefer self-directed learning.

Members are currently booking in their professional development for the winter semester—and we have many options for you. Your local chapter offers a program of topical seminars and webinars that keep you up-to-date on what’s happening in the industry, such as our extremely popular Ontario Auto: The Next Wave session held in October. Our Fundamental Series sessions offer you the chance to get up-to-speed quickly on insurance topics.

We also offer the Member Bonus series for members—stay tuned for upcoming dates of these popular one-hour complimentary webinars. I hope you take advantage of this great membership benefit! To see what’s coming up, visit your local chapter page from our website.

Our holiday season will be here shortly, and this means that so, too will winter. Let’s hope it’s another mild one! From myself and the Council, staff and instructors here at the IIO, I wish you a safe and happy holiday season.

Robert Fellows, MBA, FCIP, CRM
President, Insurance Institute of Ontario
2017 National Leadership Award honouree:

Alex Stringer, FCIP, CRM

This year marks the ninth year of the National Leadership Awards; a unique program that celebrates outstanding achievement in Canada’s property and casualty insurance industry.

The Leadership Awards were created to give prominence to the outstanding achievements of industry leaders who demonstrate a passion for lifelong learning and dedication to their employer, profession and community. Nominations are accepted in both the Emerging and Established Leader category.

The CIP Society is pleased to announce this year’s honouree:

Emerging Leader:

Alex Stringer, FCIP, CRM
Broker, Assurances J.-Marc Beauregard Inc., Marieville, QC

“On behalf of our Council, I am very proud to recognize Alex as an Emerging Leader in 2017,” said Mike Kosturik, Chair of the CIP Society National Council. “The Leadership Awards provide an excellent platform to recognize members such as Alex, who demonstrate strong leadership in all areas of their lives. We thank the nominators who identify greatness in their colleagues and take the time to put together the nominations. Without their efforts, we would not be able to continue to promote and celebrate our industry’s leaders.”

Award Ceremony

Alex will be presented with his award at the Institut d’assurance de dommages du Québec convocations on January 13, 2018 in Quebec City, and on March 28, 2018 in Montréal.

“The CIP Society advances the education, experience, ethics and excellence of our graduate community,” said President and CEO, Insurance Institute, Peter Hohman. “Through the Leadership Awards, the Society also celebrates excellence within our membership. It is a great pleasure to welcome Alex to the Leadership Circle, where he joins 35 exceptional leaders who uphold the values of the Society in their professional and personal spheres.”

Meet Alex Stringer

Alex joined the firm Assurances J-Marc Beauregard Inc. in 2013 as an independent broker, which has allowed him to establish his own customer base. He is responsible for increasing the brokerage’s sales volume both in personal and commercial lines insurance. Every year, he has increased his new business policies sales numbers while managing an important volume of regular business.

“Thanks to his large network of contacts within the industry and his good market knowledge, Alex is rapidly becoming a leading broker in his brokerage,” boasts his nominator.

To learn more about Alex, and for information about how to nominate a leader you know for the 2018 installment of the program, please visit the CIP Society website at www.insuranceinstitute.ca/cipsociety.

The Insurance Institute of Ontario was proud to once again be an exhibitor at the annual IBAO Convention and Trade Show that was recently held in the beautiful city of Ottawa.

We valued the time we got to spend with Ontario brokers and the opportunity to tell you all about how we can assist you with your education, your career, and of course, the service you provide to your clients.

Congratulations to the following winners of a $100 Best Buy or Chapters gift card:

Bev Gallant, CIP, CRM, Vice President, Operations, Arthur J. Gallagher; Shelly Rees, CAIB, Account Executive, McDougall Insurance & Financial; Robyn Verbuyst, CIP, Commercial Insurance Advisor, Canada Brokerlink (Ontario) Inc.

If we missed you, please feel free to contact us about these learning opportunities:

• Using your CAIB as credit towards the CIP Program
• Obtaining your RIBO hours through our quality seminars or CIP courses
• CE OnDemand: Online courses to get your CE hours anywhere, anytime
• Other opportunities available to brokers

We hope to connect with you again soon!
Need CE/RIBO hours? We’ve got you covered!

Get your continuing education credits anywhere, anytime

Need to know more about emerging issues & p&c products. Do you have limited time? No problem. You can now get your CE credits anywhere, anytime with CE OnDemand.

We offer a number of ways for you to get your CE hours—and cutting-edge knowledge.

• **Seminars**—Many of our high-calibre seminars and webinars are tailored for brokers—including both the content and the availability of continuing education credits to help you maintain your licence. Check your local chapter’s webpage for a list.

• **CE OnDemand**—A new catalogue of online continuing education courses for brokers and agents. Take a one-hour CE OnDemand course from wherever you are, anytime during the day or night.

• **Courses**—Each CIP, FCIP, Risk Management and Advanced CIP course you take gets you 16 to 20 RIBO hours per course, which means you get your credits while you study for a designation or certificate.

For more information, visit www.insuranceinstitute.ca.

Be a part of the Insurance Institute’s demographic research and have your say!

Answer the employee survey by November 30

The Insurance Institute is pleased to announce that we have contracted with the Conference Board of Canada for the 2017/18 demographic research—specifically to conduct four phases of data collection, to research changing workforce issues, and to benchmark the industry’s workforce compared to other sectors and Census Canada data.

We’ve invited industry employers to participate by sending the survey link to employees and executives to encourage participation. If your organization is able to participate, you should have received an email from your HR department inviting you to complete the survey. If your organization is not able to participate, then as a member, you should have received an email from the Insurance Institute on October 24 inviting you to complete the survey. The survey closes on November 30.

The employee survey asks you how you feel about working in insurance and how some of the changes in the industry may be impacting or will impact your roles and your organization going forward.

Six expected key outcomes of the research:

1. An understanding of the major recruitment and retention challenges faced by employers in the p&c insurance industry, as well as potential strategies to mitigate these challenges.

2. Insights about how the skill requirements of the p&c insurance industry’s workforce are changing.

3. A comparison of how the p&c insurance industry’s demographic trends contrast with the rest of Canada’s labour force.

4. An understanding of the strategic implications of key emerging issues for the p&c insurance industry’s professional workforce and appropriate recommendations to manage these challenges.

5. A 10-year outlook (2017–2027) projecting the potential change in the p&c insurance industry that may be attributable to demographic trends and to emerging issues.

6. Identification of the degree to which the perceptions of the industry (CEO, HR and employees) are consistent with the demographic realities and the key emerging issues that are likely to have the most influence on the composition of the industry’s future workforce.

For more information, please contact Margaret Parent, Director, Professionals’ Division at mparent@insuranceinstitute.ca.
Membership: why do you need it?

You’re a member in good standing of the Insurance Institute of Ontario—but what do you actually get for your annual membership investment? Membership of an association started by the industry itself means more than just a list of benefits: we’re an insurance community of which you are an important part.

With it being six months into the membership year, it’s a good opportunity to review what being a member of the Insurance Institute really means.

Rich history: you belong to one of Canada’s oldest industry associations

The Insurance Institute was founded in 1899 by a group of major insurance companies. These companies came together with a common goal in mind—to create an organization that provides a high standard of educational options to insurance professionals. For over a hundred years, we stood the test of time and have evolved to meet the needs of the dynamic insurance industry.

What benefits do you get as a member?

As was mandated by those that formed the Insurance Institute, we rely on the support of members like you to be able to achieve the goals that have been set for us. And in return, we’re able to provide you and the industry with many benefits, including:

• Access to internationally-recognized designations: make your name stand out by becoming a Chartered Insurance Professional or Fellow Chartered Insurance Professional. Industry employers look for these designations because they recognize that the knowledge and skills gained while earning these designations bring value to their organizations.

Whether you are currently taking courses or not, all members can also take advantage of these benefits:

• Elevate your career with our quality professional development and networking opportunities. Your membership allows us to keep you informed of the latest industry happenings, such as the new Cannabis: Insurance & Risk Management Implications Roadshow we developed to start making it’s way across Ontario starting February 2018.

• Take advantage of our Member Bonus webinars—a series of complimentary offerings provided by us with topics voted on by our CIP students. They also offer 1 RIBO hour each. Stay tuned as we release more topics in the new year.

• Give yourself the edge with our ever-evolving suite of certificate programs such as the Advanced CIP and Risk Management programs. Through your support as a member, we’re able to hire experienced instructional designers who ensure our educational offerings contain quality content and knowledge that are applicable to your real-world situations.

• Utilize our industry research to keep you up-to-date. As thought leaders, we conduct and deliver reports on industry concerns that you can take advantage of.

• Access our library of trends papers from the CIP Society and our Emerging Issues Research Series, which so far includes reports on the sharing economy, cyber risks and automated vehicles.

benefit from the LearnDirect program

When you register for a course or seminar with us, do you wish there was an easier way than paying for it yourself and applying for reimbursement? You might not be aware that there is a solution that could greatly benefit you—as well as your HR and accounting departments.

We’re seeing an increased interest from both companies and students in putting an emphasis on education, which has led to a rising participation rate in our LearnDirect program (formerly Company Bill—Learning). LearnDirect simplifies all employee registrations for the Insurance Institutes’ CIP and FCIP courses, seminars, and other educational offerings. We issue only one invoice, and your company makes one simple payment.

Everyone wins with LearnDirect—this means less administrative work for your HR and accounting departments and a speedier registration process for you and your colleagues.

To find out if your company participates, first connect with your HR team and ask if they are on a direct bill program with the Insurance Institute. If they would like to find out more about how this program can benefit your company and its learning needs, please send an e-mail to learndirect@insuranceinstitute.ca

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Get on board with National Education Month: February 2018

Learn how the Insurance Institute’s programs can help create a successful onboarding experience for new employees as local institutes and chapters across Canada host seminars, networking events and meet and greet opportunities throughout the month of February. Education and career development will be the focus of these conversations aimed at helping employers ensure new employees have the right tools and training to do the job. The Insurance Institute has several educational courses, programs and seminars that can assist employers with the onboarding process and help new employees gain highly relevant industry knowledge right off the start.

Attend local events to find out more about our insurance industry onboarding programs including:

- Insurance Fundamentals seminars and webinars
- General Insurance Essentials (GIE)
- C11, the first course in our Chartered Insurance Professional (CIP) designation program
- CE OnDemand
- p&c Insurance Essentials for Executives

Also, check out mycareer at www.insuranceinstitute.ca/mycareer our online career management resource where you’ll find tools to support your employees in their insurance career and on-going professional development.

To find out what’s happening during National Education Month in your area, contact your local institute or chapter manager, or visit www.insuranceinstitute.ca/nationaleducationmonth.

Membership: why do you need it?

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- The industry benefits from our periodic demographic research reports which track industry recruitment, retention, succession planning, and education and training.
- Take advantage of the latest education technologies, which we’re able to offer thanks to your membership support.
- We recognize that as busy insurance professionals, it might not be convenient for you to attend courses in a traditional classroom format. That’s why we invest in technology to be able to offer you classes in formats such as real-time and self-paced virtual classes.
- Our new free mobile app, IIC Mobile Learning, has proven popular with CIP students who need practice exam questions and on the go access to the dictionary of insurance.
- If you need RIBO hours, we recently launched CE OnDemand, a catalogue of one hour self-paced online courses.
- Give yourself the edge and get to where you want to go sooner, with our career advice. There are many pathways in the insurance industry and we provide all the education options to help you reach your goals. Let us help you choose the right next step.
- Members benefit from the CIP Society—once you’re a CIP graduate, a whole new world of membership benefits open up for you. As with any designation-granting institution, your continuation as a member in good standing also signifies a commitment to your profession.

Your membership demonstrates a commitment to your profession and professional alignment with an organization that is recognized as a leader in the industry for education.

It’s for all of these reasons that we thank you for keeping your membership with us in good standing—it’s of great benefit both to you as an insurance professional and to the property and casualty industry in Canada. If you have yet to renew, log into your profile at www.insuranceinstitute.ca or call Member Services at 1-866-362-8585.

2017 Canadian Insurance Top Broker Summit

The Canadian Insurance Top Broker magazine held its annual Top Broker Summit at the Ritz-Carlton Hotel in Toronto on November 27. The Insurance Institute was honoured to once again be the education partner for this event. The Top Broker Summit is a day of education and networking that gives top producing commercial insurance brokers the opportunity to hear from industry leaders and speak with senior-level risk managers.

We were pleased to bring you the lunchtime keynote presenter, Lisa Taylor, president of Challenge Factory, who gave an informative and insightful presentation on “Talent and the Future of Work”.

We look forward to connecting with you again at the 2018 Canadian Insurance Top Broker Summit.
Cannabis: Insurance & Risk Management Implications

Special presentation coming in 2018

How will the legalization of cannabis affect your work as an insurance professional? As of July 1, 2018, cannabis possession and consumption will be legal in Canada immediately impacting all aspects of property and casualty insurance.

This new informative roadshow is designed to bring you up-to-the-minute information on:

- New regulatory landscapes—federal, provincial, municipal
- Risk associated with possession and use of cannabis in a variety of contexts

Gain a better understanding of insurance-specific implications of cannabis as at the date of the seminar, and the knowledge you need to continue doing your job effectively.

Dates and Locations:

GTA, February 21
Conestoga, February 26
Hamilton/Niagara, March 7
Kawartha/Durham, March 22
Southwestern, April 24
Cambrian Shield (Webinar) Date TBC

Mark your calendars for these upcoming sessions. For more information visit www.insuranceinstitute.ca/Ontario and click on ‘Seminars’.

Did you know we offer licensing study resources?

Give yourself—or someone you know—the best chance of success on the licensing exam.

The Insurance Institute is a trusted source of education for the p&c industry in Canada, and we want to ensure that new entrants to our industry are well-prepared.

Licensing exams can be challenging—which is where we come in. We provide study resources to prepare you to take these local licensing exams, in a range of formats to suit your needs and time-commitments:

In-class preparation:

Benefit from a traditional classroom format at one of these locations:

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<tr>
<th>Chapter</th>
<th>Start Date</th>
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<tr>
<td>Conestoga</td>
<td>January 8, 2018</td>
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<tr>
<td>Cambrian Shield—Sudbury</td>
<td>January 22, 2018</td>
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<tr>
<td>Ottawa</td>
<td>January 22, 2018</td>
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<tr>
<td>Conestoga</td>
<td>February 7, 2018 (three-day exam prep)</td>
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<td>Conestoga</td>
<td>March 5, 2018</td>
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<td>Southwestern</td>
<td>March 5, 2018</td>
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Stay tuned as we confirm more dates.

New! Online class:

If you need flexibility in your study but would also like the benefit of peer group settings and access to an instructor, this course is for you. You get three months’ unlimited access to the recorded lessons, the current study materials, and a variety of additional resources—all designed to help you prepare to pass your exam.

New! Online tutorial:

The self-study kit forms the base study material that you need to know in preparation to take your Other Than Life (OTL) exam. **But with this online tutorial, you can go into your exam with confidence.** It includes hundreds of additional practice exam questions, glossary of terms as well as additional resources to help you.

Whether you are in a class, taking our online class, or studying with our kit, this online tutorial will prove to be a valuable tool.

Need to get licensed in Ontario/Alberta etc? We can help with this too.

Learn more about our licensing options.

Visit us at www.insuranceinstitute.ca/Ontario and click ‘Licensing in Ontario’.