

May 2025

Conference & Trade Show

Value-Driven Profitability



A message from the President

Welcome everyone to the 2025 CUISA Conference! It's hard to believe but it has almost been a year since our 40th anniversary conference last June. I am thrilled to welcome our members and all delegates back to this year's event!



With an exciting lineup of speakers and topics, the conference's theme **Values-Driven Profitability** will explore how CUISA Agencies' core values foster exceptional member relationships and drive strong financial results.

I look forward to seeing you over the next few days and I encourage you to embrace the spirit of collaboration. Every conversation, seminar, and meal are an opportunity to forge new paths and foster meaningful connections. If you see someone you haven't met yet, please take the initiative to introduce yourself and get to know them—you'll be glad you did!

I always welcome your feedback and ideas to make the conference better, and to make CUISA stronger. Feel free to approach me at any time during your stay here, I'd love to hear from you.

Peter Knowles



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A message from the **Executive Director**



Welcome back to the River Rock Casino Resort! Our 40th anniversary conference last year was a blast, and this year we've made improvements to build on our success.

You'll notice the conference is earlier than last year, and that there is a larger spread between us and IBABC's excellent leaders conference. That's based on feedback, especially from our insurers and partners, that it was tiring to be away from the office and home for 2 out of 3 weeks in June. Next year will likely see similar timing.

You'll also notice the brand-new Gordon Ramsay Steak restaurant and lobby bar, a great and much needed addition to allow a nice place on site to connect and get caught up on business and the relationships that make our businesses tick.

And you'll witness some new seminars and fresh messaging alongside our traditional favourites during our speakers program which I'm sure you'll find valuable and interesting. Don't forget to sign in for your CE credits! We'll strive to have your credit letters delivered to you before the end of May.

Finally, it is my goal to ensure you get the most out of our conference and leave feeling that it was a worthy investment of your time and money. If there is anything I can do to make your experience better, please don't hesitate to contact me—my cell is **604-988-9802**. Texts are the best way to get my attention.

Enjoy!

John Dickinson

Program Schedule

Values-Driven Profitability

River Rock Hotel & Casino, Richmond, BC

Tuesday, May 13

4:00 pm – 8:00 pm	Registration Desk Open Lobby, 2nd floor River Rock
4:00 pm – 5:30 pm	Annual General Meeting (members only)
5:00 pm – 7:00 pm	Opening Night Reception
7:00 pm onwards	Networking on your own

Wednesday, May 14

7:30 am – 9:00 am	Registration Desk Open Lobby, 2nd floor River Rock
8:00 am – 9:00 am	Breakfast
9:00 am – 10:00 am	Bryan Yu: Navigating Economic Waters
10:00 am – 10:30 am	Coffee/Networking
10:30 am – 11:30 am	Sam Thiara: Insuring What Matters
11:30 am – 12:30 pm	Blair Feltmate: Preparing Homes for Climate Change
12:30 pm – 1:30 pm	Lunch
1:30 pm – 3:00 pm	ICBC: Moving Together with Brokers for our Customers
3:00 pm – 3:30 pm	Coffee/Networking
3:30 pm – 4:30 pm	Insurance Council of BC: Update
6:00 pm – 7:00 pm	Dinner Reception
7:00 pm – 11:00 pm	Gala Dinner

Thursday, May 15

7:30 am – 9:00 am	Registration Desk Open
8:00 am – 9:00 am	Breakfast
9:00 am – 10:00 am	Panel: Trends in BC's Insurance Industry Featuring moderator Alex Wong: Jeremy Green; Kirsty Sriver; Maureen Kurenoff; Mike Henfrey
10:00 am – 10:30 am	Coffee/Networking
10:30 am – 11:30	Harper Grey LLP: Trends in Employment Law
11:30 am – 12:30	Applied Systems: Business Strategy Driving Technology
12:30 pm – 3:00	CUISA Trade Show & Silent Auction River Rock Theatre
3:00 pm onwards	Networking on your own

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Across B.C., you distributed over 90,000 reflectors, connecting with your customers on pedestrian safety. Your efforts in reaching remote parts of the province made this our most successful reflector campaign yet!





Speakers

Navigating Uncertain Waters

Wednesday, May 14th at 9:00 am



Bryan Yu

Chief Economist, Central 1

Bryan Yu leads a team conducting macro- and regional economic analysis for the organization and broader credit union system. He authors many of the team's flagship economic and housing outlook reports and weekly notes and speaks regularly at credit union and industry events. Bryan is frequently contacted by media to provide national and provincial economic commentary. He also leads Central 1's IFRS9 national platform business and sits on various Central 1 risk and treasury committees. Bryan joined Central 1 in 2010 and previously worked as a housing economist for the BC Real Estate Association, CMHC, and conducted academic research in immigration economics. Bryan holds an MA in Economics from Simon Fraser University and a BA from the University of Manitoba. He currently serves on the boards of S.U.C.C.E.S.S. the B.C. Paraplegic Foundation and the Canadian Association for Business Economics.

Insuring What Matters: Driving Profitability with CARE

Wednesday, May 14th at 10:30 am



Sam Thiara

Sam Thiara is a storyteller, educator, and organizational strategist who believes that transformational experiences are the cornerstone of personal, professional and organizational growth. With a career spanning decades in leadership development, higher education, and corporate culture, Sam has dedicated his work to helping individuals and organizations uncover purpose, build connection, and thrive. His signature CARE framework—Collaboration, Adaptability, Resilience, and Empathy—guides teams toward authentic leadership, meaningful engagement, and lasting impact. Whether advising companies, mentoring emerging leaders, or guiding institutions through change, Sam's approach centers on values-driven strategy and intentional dialogue to cultivate strong, adaptable organizational foundations.

Preparing Homes for Wild Weather: Flooding, Wildfires and Heat

Wednesday, May 14th at 11:30 am

Extreme weather will be increasingly challenging due to irreversible climate change. The talk will focus on the role that credit unions can play – NOW – to help customers better prepare their homes for flooding, wildfire and extreme heat. The core theme will be "helping homeowners to help themselves".



Dr. Blair Feltmate

Blair is the Head of the Intact Centre on Climate Adaptation, University of Waterloo. Previous positions he has held include Vice President, Sustainable Development, Bank of Montreal; Director, Sustainable Development, Ontario Power Generation; Partner, Sustainable Investment Group/YMG Capital Management. Blair has written textbooks on **Sustainable Banking** and **Aquatic Ecology**.

He was on the Advisory Table, National Adaptation Strategy, Canada. He is Sustainable Finance Council member, Global Risk Institute, and he is a member of Climate Proof Canada (Insurance Bureau of Canada). Blair is on the Science, Innovation and Policy Board of Canada's Forest Trust. Blair was Chair, Federal Government of Canada Expert Panel on Climate Adaptation.

Blair was a NSERC Postdoctoral Fellow (University of Waterloo). He holds a Ph.D. in Theoretical and Applied Ecology (University of Toronto), Master's in Sustainable Development (Wilfrid Laurier University), Master's in Zoology (University of Toronto), and Hon. Bachelor's Biology (University of Toronto). He is generally interviewed by the media 100 times per year on climate change/ESG related issues. He recently received the **King Charles III Coronation Medal** for his work on climate change.



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Looking forward to see
you at the conference.



ICBC: Moving Together with Brokers for our Customers

Wednesday, May 14th at 1:30pm

ICBC's VP, Insurance, Kelly Aimers, and members of their leadership team will tell the story of how far ICBC has come since Enhanced Care was introduced four years ago and their vision for the future which focuses on customer-driven support, affordable rates, and safer and sustainable mobility. Join us for a conversation where brokers are a valued partner in ICBC's transformational journey.

- **Kelly Aimers** - Vice President Insurance and Chief Actuary
- **Cam Sutherland** – Sr Mgr Broker Governance
- **Tyler McGilvery** – Sr Mgr Broker Accounts
- **Colleen Bognar** – Sr Mgr Recovery Strategic Relations
- **Brandon Wong** - Director UW, Product Development Policy
- **David Fearncombe** – Director Ins Sales, Distribution, Governance & Business Improvements
- **Shabnem Afzal** - Director, Road Safety Policy & Programs



Kelly Aimers

Kelly Aimers is responsible for the development, maintenance and pricing for our auto insurance products. We work with over 900 Autoplan brokers as our partners for distribution as well as providing additional support for our customer's insurance needs.

Kelly has been with ICBC since 2006 and most recently in the role of Chief Actuary. Before joining ICBC, she worked in consulting for 10 years in the pension and health and welfare practices. She is a Fellow of the Canadian Institute of Actuaries and an Associate for the Casualty Actuarial Society. In her spare time, she helps “manage” my three kids as well as play an active role in coaching their many sports.



Cameron Sutherland

Cam Sutherland is ICBC's Senior Manager of Broker Governance. He is responsible for driving strategic broker initiatives, implementing the Strategic Broker Accord, and managing broker compliance programs. Cam chairs and manages various broker consultation groups including the Memorandum of Understanding Council (MOUC), ICBC Broker Liaison Committee and the Broker Online Task Force. Cam has a Bachelor of Management from the University of Lethbridge and has worked in several divisions at ICBC since 2000.

Tyler McGilvery



Tyler McGilvery is a Senior Manager in ICBC's Insurance Sales & Distribution and is responsible for the sale and distribution of ICBC's products and services through over 900 broker locations throughout British Columbia. During his 15 years with ICBC, Tyler has served in a variety of leadership positions including Insurance Business Improvement and managing the Broker Enquiry Unit and Autoplan Sales call centres. In addition, he volunteers with the Insurance Institute of BC as Chair of the Events Committee and is Treasurer of the Salute Insurance Person of the Year Society. Tyler has a Psychology degree from Thompson Rivers University and is a Chartered Insurance Professional (CIP).

Colleen Bognar



Colleen Bognar joined ICBC in 2021 and is the Senior Manager of Recovery Strategic Relations, where she leads a dedicated team responsible for supporting and engaging health care providers and associations across the province who work with customers in their recovery journey. Prior to this role, Colleen spent over two decades in the private outpatient rehabilitation sector, holding leadership roles across a network of clinics in British Columbia. In her last role she served as Director of Clinical Services, overseeing clinical program development, risk management, and day-to-day operations at sites offering complex interdisciplinary programs, including Pain and Medication Management and Psychological Trauma treatment.



Brandon Wong

Brandon Wong is ICBC's Director of Underwriting, Product Development Policy. He is responsible for oversight of risk underwriting, underwriting services and the operational delivery of ICBC's commercial underwriting garage and fleet business. Brandon has been with ICBC for over eight years and was also the business lead for ICBC's Rate Design project as Insurance Portfolio and Product Advisor. Brandon earned his Chartered Insurance Professional accreditation through the Insurance Institute of Canada in 2013 and has worked in the insurance industry well before that at RSA Insurance and Canadian Direct Insurance.



David Fearncombe

David is ICBC's Director, Insurance Sales, Distribution & Business Improvement. He is responsible for driving our strategic direction of the sale and distribution of ICBC's products and services. He oversees both the Broker Accounts and Broker Governance teams as they build relationships with our broker partners while continuing to manage broker compliance to over 900 broker locations throughout British Columbia. David has significant sales and distribution experience in financial services including, most recently, at Coast Capital Wealth Management. Prior to Coast Capital, David directed distribution for western Canada for Desjardins Wealth. He also spent some time on the board of North Shore Insurance Services.



Shabnem Afzal

As Director of Road Safety at ICBC, Shabnem leads a team of road safety engineers and managers, inspiring them to enhance safety for all road users. Passionate about public safety, Shabnem's career spans across the Atlantic Ocean: including research positions at a number of prestigious UK universities before moving into a Senior Consultant role with New Scotland Yard's organized Crime Unit in London, England where she designed performance metrics for complex criminal files. She acted as an expert advisor in a number of high-profile justice files for the UK Federal government which resulted in new policies being established.

Shabnem holds a Bachelors with Honours in Sociology as well as Master of Science in Criminology and Criminal Justice from the University of Wales.

Insurance Council of BC Annual Update

Wednesday, May 14th at 3:30pm

One of the most popular presentations, CUISA is grateful to have the continued participation of Council executives as they provide an update on their latest projects and activities.



Brett Thibault

Brett Thibault is the Director, Governance and Stakeholder Engagement for the Insurance Council of BC. He joined the Insurance Council in 2016 and prior to joining as a staff member he was a voting member and past Chair of Council. Brett oversees the Insurance Council's communications, stakeholder engagement, and project management activities as well as liaises with the provincial government regarding Council member appointments and policy matters.

The Optimum West team is excited to connect at CUISA in May

Get in touch with us

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Panel Discussion: Insurance and Brokerage Business Trends

Thursday, May 15th at 9:00 am

The business world is facing a period of rapid change, and the insurance brokerage industry has not been immune. From consolidation to technology to personnel, this panel of insurance leaders will discuss some of the business trends impacting the brokerage industry.

Moderator: **Alex Wong**, Smythe LLP

Panelists: **Jeremy Green**, **Maureen Kurenoff**, **Michael Henfrey**, and **Kirsty Scriver**



Alex Wong

Alex Wong is the practice group leader for Smythe's transaction & valuation advisory group and P&C insurance industry group. He has 20 years of experience in advising businesses on acquisitions, divestitures, valuations, tax and accounting matters. He holds Chartered Professional Accountant (CPA, CA) and Chartered Business Valuator (CBV) designations, winning the George Ovens award for the highest mark in Canada on the CBV final exam.



Jeremy Green

Vice President of National Group Operations & Sales and Business Development, BC, Intact Insurance.

Jeremy Green was appointed to the role of Vice President, National Group operations, Intact Insurance in June of 2024 and continues to additionally lead Intact's British Columbia Sales & Business Development operation. Jeremy is the third generation in his family to work in the insurance industry and worked as an insurance broker for 13 years, 10 of which were with Credit Union insurance operations. He has held various roles with Canadian insurers including Optimum West's Regional Vice President of British Columbia, Optimum West's Vice President of Business Strategy, Intact's Vice President of Claims (Western Canada) and Belairdirect's Vice President of Sales & Operations (Ontario & Western Canada). In his current role with Intact, Jeremy sits on the National DE&I Steering Committee, the National Ethics Committee and leads Intact's National Networking Committee for Young Professionals. Jeremy has served as Treasurer of CUISA, Board Chair of RainCity Housing Society and now serves on IBC's BC Committee. Jeremy was the recipient of Salute Insurance Person of the Year Society's Rising Star in 2011, and he holds his CAIB and CIOP insurance designations.



Maureen Kurenoff

CEO, Growth Financial Corp

Maureen is the CEO of Growth Financial Corp, a strategic partnership between StellerVista Credit Union and Creston & District Credit Union. With 8 general insurance offices and 2 wealth management offices, Growth Financial Corp provides insurance and investment services throughout the Kootenays and Okanagan, and all of BC through a provincial call center.

Maureen was appointed as a Non-Voting Member of the Insurance Council of BC in 2022. She has been a CUISA Board Member since 2020.



Michael Henfry

General Manager, Bulkley Valley Insurance Services

Mike has been in the Insurance Industry for 34 years. He's been on both sides of the aisle - he was an independent for the first half of his career and he's worked from the smallest office you could find (just him) to the largest insurer in Canada (Marsh). He specialized in commercial insurance but has stepped back from production to managing Bulkley Valley Insurance for 16 years. He works with an amazing team of 20 staff, and is proud that their efforts result in profits to our credit union who's main focus is to support our communities.



Kirsty Scriver

CEO, Insurance Services, Interior Savings insurance, and Coastal Community Insurance

Kirsty has 30+ years of experience in the insurance industry working on both the independent broker side and 20 years on the Credit Union side. She is passionate about creating positive change in the insurance industry especially in our complex and changing landscape. She is a lifelong learner having obtained my CAIB, CIP & CRM. She has been on the CUISA board for the past 10 years.

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Harper Grey LLP: Employment Law Trends

Thursday, May 15th at 10:30 am



C. Ryan Chan

With a decade of experience, Ryan is sought after by clients for his broad expertise and unique insight. Ryan now focuses his practice in the areas of family law and workplace law and has successfully represented clients in both areas.

Ryan has considerable court experience having appeared in various proceedings in Alberta and British Columbia including before the Provincial Court, Court of Queen's Bench, Supreme Court, Court of Appeal, Employment Standards Tribunal, and the Alberta Human Rights Tribunal.

He is dedicated to advocating for his clients and resolving disputes with his practical advice and compassionate approach. While he is experienced and able in the courtroom, he is equally adept in alternative dispute resolution methods including Collaborative Law and mediation. In 2015 he became a Certified Collaborative Divorce Lawyer.

In his workplace law practice, Ryan assists clients on employment-related matters including terminations, wrongful dismissal and constructive dismissal claims, drafting employment contracts, and human rights issues. Ryan also extensive experience in drafting workplace policies.

Harper Grey LLP: Employment Law Trends

Thursday, May 15th at 10:30 am



Emma Jerrott

Emma is an associate working with our workplace, insurance and health law groups. She currently assists senior members of the firm with all aspects of file management. Emma attended law school at the University of British Columbia and completed her articles with Harper Grey before being called to the BC Bar in 2024.



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Applied Systems: Business Strategy Driving Technology

Thursday, May 15th at 11:30 am

The topic of strategy setting as a critical step in driving positive organizational outcomes will be explored by Lance Hudgin, Applied Systems Sales Director. He'll speak on how outward facing strategy impacts internal operations, and review how technology can support organizational strategy. Finally, an update will be provided on product developments over the past twelve months and what's ahead for Applied.



Lance Hudgin
Sales Director, Applied Systems

CUISA Conference, Trade Show & AGM

The CUISA Association's core purpose is to promote and protect the interest of our members, the interest of the insuring public, and the interest of insurers in all matters pertaining to the insurance business & related services.

This includes fostering and encouraging a high standard of ethics in the insurance business and related services, and discouraging all unfair and unethical practices. The association will encourage the study of insurance and related services to promote a better understanding on the part of its members and the insuring public.

On behalf of our members, the association co-operates with, and assists, the appropriate ministries of government and municipal bodies in all matters pertaining to insurance and related services





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