

**Insurance Brokers Association of Ontario
89th Annual Convention**

PROGRAM HIGHLIGHTS

Wednesday, October 21 - Friday, October 23, 2009
The Fairmont Royal York Hotel,
Toronto, Ontario



Register Early and Save!

SCHEDULE OF EVENTS

Wednesday, October 21, 2009

7:30 a.m. - 8:00 p.m. **Registration Desk Open**
Entrance to all functions is by name badge identification!

8:00 a.m. - 11:00 a.m. **Breakfast & Affiliate
Presidents' Meeting**

11:30 a.m. - 1:30 p.m. **Education Awards
Luncheon**

Join us as we honour those who have achieved their professional designation.

1:30 p.m. - 4:30 p.m. **Members' General Meeting**

5:15 p.m. - 8:00 p.m. **Exhibitors' Opening
Reception**

Kick off Convention at the Exhibitors' Opening Reception.

8:00 p.m. - 12:00 midnight **Opening Night Party**
featuring **The Sandy Vine Band**

A great way to kick off the 2009 convention!

Thursday, October 22, 2009

7:30 a.m. - 8:00 p.m. **Registration Desk Open**

7:30 a.m. - 8:30 a.m. **Continental Breakfast**

8:30 a.m. - 9:15 a.m. **Keynote Speaker**
Donald Cooper
Human Marketing & Management



Since 1991, international business speaker and coach Donald Cooper has devoted himself to helping businesses in over 40 industries throughout the world to redefine and reinvent themselves to create a significant competitive advantage, improve management effectiveness and increase profitability.

Having spent 20 years as a world-class manufacturer (Cooper Sporting Goods) and 14 years as one of Canada's most innovative retailers, Cooper knows what hard work is all about. He got his start working at his family's business – Cooper Canada at the age of 6. Cooper Canada went on to become the world's leading manufacturer of hockey equipment and Canada's largest maker of both sporting goods and fine leather goods. After leaving Cooper Canada, he founded Alive & Well, a unique women's apparel and gifts "warehouse boutique" that fundamentally reinvented the very idea of what a retailer could be and attracted international attention. In just 3 years, it garnered seven awards for marketing, service and business excellence and community involvement, including being voted Canada's Outstanding Innovative Retailer in 1991.

His benchmark work on vision, mission, marketing and management effectiveness has helped businesses create clarity, commitment and accountability about where they're going, and how they'll get there.

Thursday, October 22, 2009 *continued*

9:15 a.m. - 11:30 a.m. **Members' Closed Meeting**
Hear important industry news and provide your views about the direction IBAO needs to take in the coming year.

11:30 a.m. - 1:30 p.m. **Exhibit Area Buffet Lunch**
Enjoy your lunch while networking with peers and meeting new contacts.

1:30 p.m. - 4:45 p.m. **CSR SEMINAR:**

Effective Strategies for Managing Workplace Stress and Boosting Your Productivity

(RIBO CE - 3 Personal Skills Hours)

Wendy Woods, Watershed Training

Stress zaps us of our energy, motivation and health. In this session learn how to manage your stress and boost your energy for greater revitalization. Learn how to describe the toll stress takes on our bodies and minds, identify stress management solutions for industry specific stressors and mobilize a stress management action plan.

1:30 p.m. - 5:00 p.m. **MEMBERS' SEMINAR:**

CEO Panel

(RIBO CE - 3 Management Hours)



We welcome Deirdre McMurdy as our CEO Panel moderator replacing Evan Solomon. McMurdy is one of Canada's leading business journalists in both print and television. She is widely known for her work as a business columnist and business editor for Maclean's magazine, and columnist for Canadian Business magazine. She was also the business editor on CTV's morning program, Canada AM for five years before co-hosting Global Television Network MoneyWise with Peter Kent. Presently, she is an Ottawa Correspondent for CTV's Business News Network (BNN) and writes two columns for the Ottawa Citizen and CanWest, and is a columnist for the The National Post.

This year, the Panel will be comprised of five top executives from leading property and casualty underwriters. Our line-up of industry CEO's who will be participating in this popular event are:

Jean-Francois Blais, President & CEO – Axa Canada;
Robin Spencer, President and CEO – Aviva;
George Cooke, President and CEO – The Dominion;
Kevin McNeil, President & CEO – Gore Mutual;
Charles Brindamour, President & CEO – Intact Insurance

The Panel will offer their views on such topics as:

- Ontario Auto – What's next?
- Market Conduct – Is there a Standard?
- Today's insurance marketplace;
- The recession – is it over? and
- The property and casualty industry overall.

5:30 p.m. - 6:00 p.m. **Exhibit Prize Draws**
Be there to claim your prize.

6:30 p.m. - 10:00 pm. **Hospitality Night**
Good food, good wine, and GREAT HOSPITALITY!

SCHEDULE OF EVENTS

Friday, October 23, 2009

7:30 a.m. - 12:30 p.m.

Registration Desk Open

7:30 a.m. - 8:30 a.m.

Continental Breakfast

8:30 a.m. - 11:45 a.m. **EDUCATION SEMINARS (AM):**

(only 1 may be selected)

A [Human Marketing®...How to Increase Market Share & Profitability in the Face of Ever-Stronger Competition...and ever-faster change!](#)

(RIBO CE - 3 Management Hours)

Donald Cooper, Business Management, Marketing and Service Expert

Every industry today is in a crisis of overcapacity. From burgers to banks, from hardware to software to underwear, from high-tech to low-tech to no-tech, whatever product or service you sell, there are probably too "damn" many other people selling it! Learn effective strategies for increasing market share and profitability in the face of strong competition and rapid change.

B [Effective Claims Handling – the Broker Value Proposition](#)

(RIBO CE - 3 Technical Hours)

Stephen Scullion, Director Professional Development & Brent Hackett, Assistant Vice President, Catastrophe and Property Services - Crawford Adjusters

This session will take an in depth look at claims handling from both a broker and company perspective and focus on developing a consistent best practice approach to the claims process. Topics covered will include: valuations, current trends, roles & responsibilities, intake & follow up and the broker value proposition.

C [Understanding Consumer Expectations](#)

(RIBO CE - 3 Management Hours)

Randy Carroll, CEO - IBAO & Paul Taylor, Director of Operations - IBAO

The Ontario insurance market is experiencing unprecedented change. Review the latest Ontario market intelligence and understand how new market segments with different buying criteria are emerging. See firsthand what factors influence Ontario insurance consumers to make their insurance decisions and learn how your brokerage needs to adapt. This workshop will review the specific opportunities and risks that exist in the market in the following key areas:

- Managing current demand (with existing clients)
- Capturing Competitive Demand (from non broker markets)
- Creating Brand New Demand (attracting new clients for the first time)

Join Randy Carroll and Paul Taylor as they review timely, proprietary "must have" business intelligence that is critical to the long term growth and prosperity of your brokerage!

Friday, October 23, 2009

12:00 p.m. - 1:30 p.m.

Industry Day Luncheon

Join your industry colleagues for lunch. Through the State of the Union Inaugural Address by our Incoming President and highlights of IBAO's activities, attendees can take pride in the association and find out plans for the upcoming year.

1:45 p.m. - 5:00 p.m. **EDUCATION SEMINARS (PM):**

(only 1 may be selected)

A [Human Marketing®...How to Increase Market Share & Profitability in the Face of Ever-Stronger Competition...and ever-faster change!](#)

(RIBO CE - 3 Management Hours)

Donald Cooper, Business Management, Marketing and Service Expert

Repeat from morning session.

Every industry today is in a crisis of overcapacity. From burgers to banks, from hardware to software to underwear, from high-tech to low-tech to no-tech, whatever product or service you sell, there are probably too "damn" many other people selling it! Learn effective strategies for increasing market share and profitability in the face of strong competition and rapid change.

B [Business as Usual No Matter What – Disaster Recovery Planning](#)

(RIBO CE - 3 Management Hours)

Paul Sullivan, VP & General Manager - Agility Recovery Solutions

Have you ever thought about all the people who depend on your business? You've made promises to your employees, clients and community that you will be there, no matter what. Do you have a business continuity plan in place that will help you keep your promise?

There are many risks in business today. Learn how you can mitigate risk to ensure your business will be able to survive an interruption.

C [Understanding Consumer Expectations](#)

(RIBO CE - 3 Management Hours)

Randy Carroll, CEO - IBAO & Paul Taylor, Director of Operations - IBAO

Repeat from morning session.

The Ontario insurance market is experiencing unprecedented change. Review the latest Ontario market intelligence and understand how new market segments with different buying criteria are emerging. See firsthand what factors influence Ontario insurance consumers to make their insurance decisions and learn how your brokerage needs to adapt. This workshop will review the specific opportunities and risks that exist in the market in the following key areas:

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BANQUET & BALL

Friday, October 23, 2009

6:30 p.m. - 9:30 p.m.

Banquet & Ball featuring: **2nd Annual Award of Excellence Gala**

This year, don't question whether or not you should stay for our closing night. IBAO will be hosting its 2nd Annual Award of Excellence Gala where we will be recognizing brokers for their contributions to the industry and community.

Categories are:



- Broker of the Year
- Brokerage
- Young Broker of the Year
- Affiliate Achievement

Once again, we were able to acquire Toronto's own local celebrity **Dina Pugliese**, Co-Host of "BT-Breakfast Television" as our Awards Host! Her credits include receiving a Gemini nomination in 2006 as the host of MuchMusic's VJ Search; appeared as a guest judge on Canada's Next Top Model; was selected as one of Canada's most beautiful people by Weekly Scoop magazine; and was rated by Hello! Magazine as one of the "Top 10 Hottest Women on Television" for 2007. This is one event you won't want to miss!

This is the only official function recognizing the merits and qualities of general insurance brokers, brokerages and affiliates.

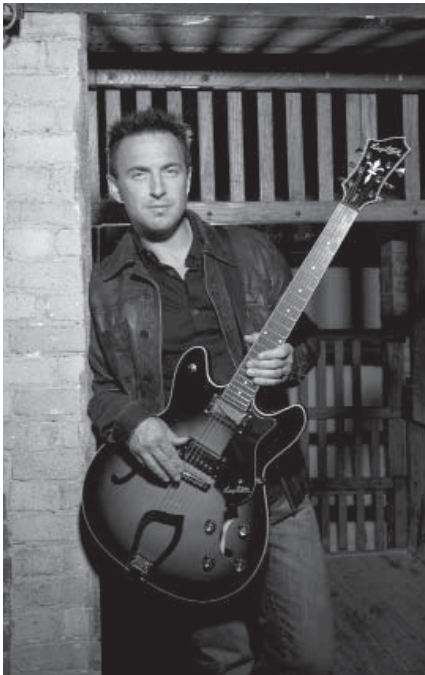
Be one of more than 500 guests who will be on hand to support the nominees, cheer for the winners and celebrate their peers!



9:30 p.m. - 11:30 p.m.

Banquet & Ball featuring concert performance by: **COLIN JAMES**

Six-time Juno award-winner **Colin James** has driven his 10-album, 25-year career with his blues influenced guitar mastery and soulful vocals.



Colin was only 18-years old when he captured the attention of guitar legend Stevie Ray Vaughn, who marveled at the prodigious talent, and decided to take him on the road through the Canadian prairies, and later the United States. It wasn't long after that the young musician began opening for the likes of John Lee Hooker, ZZ Top, Steve Winwood and Keith Richards. He was also the first to be signed to the then fledgling Virgin America label. With the seductive smash hit "Why'd You Lie?", the rocker "Voodoo Thing" and "5 Long Years", he managed to break the record for most albums sold on a first release by a Canadian artist and has since maintained the integrity of a truly enduring artist.

Colin's newest release will hit stores this fall.

www.colinjames.com

Come join us for what will prove to be one of the greatest conventions yet!

SPOUSE PROGRAM

Thursday, October 22, 2009

10:00 a.m. - 4:00 p.m.

ELMWOOD SPA - Lunch. Learn. Luxuriate.



Acclaimed as one of the Top 5 Spas across Canada by Flare Magazine and winner of the 2008/09 WestJet up! Magazine Value Awards, Elmwood Spa is the urban spa destination for women and men who seek stress relief and relaxation in a serene atmosphere.

We're here to enhance your well-being through world-class amenities, expert service and beneficial treatments that will enhance your health, wellness, beauty and balance.

Elmwood Spa is located in one of Toronto's historic landmark buildings at 18 Elm Street in the heart of downtown.

A multi-million dollar renewal has transformed our facility into a well appointed oasis dedicated to your health and well-being – with four spacious floors of treatment and renewal options for every season, for every reason there is to spa.

Whether you come to the spa to ensure that you always look your very best, or your visit is more about stress relief and survival in a busy world, Elmwood Spa is an ideal place to spend a few hours for self renewal.

Two restaurants, a juice bar, 34 treatment rooms, new change rooms with expanded amenities, and water therapies, including swimming pool, whirlpool and steam rooms, provide comfort, convenience and flexibility to cater to demanding schedules. Guests can be rejuvenated from head to toe.

Your day will include:

- Private 3-course Lunch in our Greenhouse off of the Terrace Restaurant;
- Unlimited access to our Water Therapies including whirlpools, swimming pool and steam rooms;
- Choice of 2 treatments; and
- An interactive 45 minutes with a professional Health & Wellness facilitator - **Elmwood Spa's Skincare 101™** seminar provides an overview of the anatomy of the skin, explains the difference between 'skin type' and 'skin condition', explores the benefits, art and science of a facial treatment, shares how facials are designed to address individual skin care concerns; skin care products and their use.



YOUNG BROKERS

Are You Under 40? Don't be left out!

The 89th Annual Convention will enable young brokers to network with a wide variety of professionals and gain new insights into the future of our increasingly complex industry.

Join the YBC!

To be eligible, you must be under 40 and working for a member office. That's all!

SPEAKER PROFILES



BRENT HACKETT, Assistant Vice President, Catastrophe and Property Services - Crawford Adjusters

Brent started his insurance career in 1982 on a work term with one of Canada's largest insurers. After a quick stint in underwriting, Brent chose to give loss adjusting a try. He followed a traditional approach of handling telephone claims before progressing to field adjusting. As the years went by, his assignments became larger and more complex until he was handling large losses across Canada and in the Caribbean as a qualified Executive General Adjuster with Crawford's Global Technical Services division.

Currently, Brent is Crawford's Assistant Vice President, Catastrophe and Property Services, working out of Crawford's Canadian headquarters in Kitchener, Ontario. He works with various clients to determine and meet their catastrophe management and property claims handling needs. He also manages Crawford's internal catastrophe response. Crawford is the world's largest supplier of claims management and administrative services. The Canadian operation consists of 90 branch operations offering multiple business line services.



STEVE SCULLION, B.Sc., FCIP, CRM, CLA, Dip.Ad.Ed., Director of Professional Development - Crawford Adjusters

Steve began his adjusting career in 1985 as a telephone adjuster with a large international insurer. He became an independent adjuster with Adjusters Canada Inc in 1989. He was the manager of the Adjusters Canada Oshawa, Ontario office until their merger with Crawford and Company in 1998. Steve was a member of the Crawford Catastrophe team and has done tours of duty in Montreal, Edmonton and the Bahamas.

In March 2001, Steve took up a new position as Manager of Professional Development with Crawford & Company (Canada) Inc. working out of the Kitchener Head Office. Steve became Director of Professional Development with Crawford in April of 2007.

Steve has been involved in the handling of sensitive claims issues such as the Walkerton, Ontario E. coli situation and was the field manager of the Ontario Disaster Relief Assistance Plan that handled flood claims in Peterborough in the summer of 2004.

Steve is one of only 8 independent adjusters in Canada who have earned the Chartered Loss Adjuster (CLA) designation from the Canadian Independent Adjusters' Association (CIAA).



PAUL SULLIVAN, Vice President, General Manager - Agility Recovery Solutions

Paul Sullivan serves as Vice President and General Manager for Agility Recovery Solutions. In this role, Paul provides strategic direction; channels partner management, service delivery, mobile operations and market management in the U.S. and Canada. Paul has 25 years of extensive product management, marketing and sales support experience in the IT services industry. A visionary leader, Paul has initiated business turnarounds from a commodity to services-based model and developed and enhanced product partnerships. Prior to joining Agility, Paul was with IBM for 2 years as General Manager of Business Resilience and Continuity services in Canada. Prior to IBM, Paul spent 13 years with Comdisco Continuity Services with the last 4 years based out of Chicago as SVP of Product Development, Sales Support and Marketing.



WENDY WOODS, Principal - Watershed Training Solutions

Wendy Woods is Principal of Watershed Training Solutions, a dynamic training company she founded in 2003. Her workshops include stress management, productive teamwork and effective communication as well as many other critical workplace skills. Wendy's enthusiastic and engaging training style energizes and motivates her participants. Her years of hands-on business and adult education experience, complimented by an M.B.A. and Certificate in Adult Education, provide her clients with productive and profitable results.

Prior to starting Watershed Training Solutions, Wendy spent most of her career in mutual fund marketing working for such outstanding organizations as Dynamic Mutual Funds, Richardson Greenshields and RBC Dominion Securities.

Recent clients who have benefited from Wendy's expertise include: Bombardier, Pfizer, Scotiabank and TD Bank Financial group to name a few. Wendy's expertise has also been featured in such media as Canadian Business Online, Breakfast Television, Rogers Daytime, Classical 96.3 and CTV News.

GENERAL INFORMATION

Sign Up

Complete the enclosed Convention Registration Form. If you are bringing a spouse or a guest, please complete a separate form.

Sign Up Early and Save!

You'll get substantial savings just by registering early! Make sure you register by September 18, 2009.

Sorry, we are not able to accept registrations over the phone.

Register ON-LINE..

Payment by Credit Card is quick and convenient. Visit www.ibao.org > Log in to the Members Section > Enter your IBAO Member Number and your Last Name (case sensitive) > Select "Convention Registration".

On-line registrants will receive an email confirmation for this event.

We only accept... VISA or MasterCard

or Register by Mail...

Send your registration form with **payment** to: **IBAO**

Please make cheques payable to IBAO

Use your **BIPPER BUCKS** to **pre-register** for the **Annual Convention**. NOT redeemable onsite at convention! BIPPER Bucks expire on December 31st, 2009, **Use'em or Lose'em!**

Refunds

Full refunds will be granted if a written request is received prior to September 18, 2009. If a written request is received prior to September 25, 2009, a full refund minus a \$75 administrative charge per registration will be granted.

NO REFUNDS WILL BE GRANTED AFTER: September 25, 2009

Transferable Registrations

Only registrations in the company's name are transferable.

Special Assistance

Please advise us of any "special needs" (i.e., physical, **dietary**). We will be glad to assist you.

Name Badges

Only registered convention attendees will receive name badges. Please wear them to guarantee admittance to all functions.

Door and Draw Prizes

All prize winners must be registered member brokers and must be present at the time of the draw.

What to Wear

Meetings & Seminars: Business Casual

Banquet & Ball: Formal, Black Tie Optional

Hotel Accommodations

Your hotel reservation is not included in your Convention Registration Package. We have been guaranteed room rates for single or double occupancy reserved before September 4, 2009.

for reservations made by **September 4, 2009:**



The Fairmont Royal York Hotel

100 Front Street West,
Toronto, Ontario M5J 1E3

\$199 per night,
single or double plus taxes for
reservations made by September 4, 2009

Tel. 416-368-2511 or 1 888-270-8802

Non-Refundable Cancellation Fee for Hotel Guests' Rooms!

The Fairmont Royal York, at the request of IBAO, will implement a non-refundable cancellation fee equivalent to one (1) night's room and tax. This applies to all guestrooms cancelled after Wednesday, October 14, 2009 (one week prior to the convention). This is to deter the practice of overbooking guestrooms.

PLATINUM PLUS SPONSORS

Sponsorship from all of our stakeholders remains important. In these times of multichannel distribution and ownership of brokerages and Banks trying to distribute insurance at the branch level, IBAO will recognize with the **Platinum Plus** level, those sponsors whose business practices are not competing with the broker distribution network in Ontario and support our efforts as it relates to the Banks. For these sponsors, ownership of brokerages and utilizing a multichannel distribution approach are not part of their delivery of products in Ontario, and for that we thank them.



**Insurance Brokers Association of Ontario
90th Annual Convention**

Mark Your Calendar!

Wednesday, October 20 - Friday, October 22, 2010
Sheraton on the Falls Hotel & Conference Centre,
Niagara Falls, Ontario

IBAO's Annual Convention has set the standard for providing the most powerful networking opportunity available for member brokers, industry leaders and service industry partners!



Insurance Brokers Association of Ontario
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www.ibao.org