



Canadian Insurance Accountants



# INNOVATION LANDSCAPE

2018 ANNUAL  
CONFERENCE

23 SEPT  
26 SEPT  
2018

SOFITEL GOLDEN MILE  
MONTREAL

## ABOUT THE EVENT

We have a rich agenda and content from across the insurance industry, addressing the inventive and leading edge technologies and approaches that truly make for an Innovation Landscape! We will launch our conference with global business insights that impact our working world from Glen Hodgson, Senior Fellow at the Conference Board of Canada. From there, we will focus on specific topics and will welcome C-Suite executives in panel sessions, where these key leaders will share their knowledge and insights. Closing out the conference, we will hear from Olympic Champion Alexandre Bilodeau about his message of determination.

Our partners are integral to building our program, through content and sponsorship support. Both are essential components and ensure top-level speakers, education and material – we thank them all for their continued commitment.

As usual, our social program of activities and evening events will ensure opportunities to network with fellow attendees, to relax and to enjoy some of the local Montreal flavour and vibe. Don't miss out!

Finally, there is YOU, our members and attendees. Your participation and engagement is key! We encourage you to sign up as soon as possible - space is limited!

We look forward to seeing you in MONTREAL!

Jason Christopherson, 2018 Conference Director  
and your Annual Conference Committee



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## PROGRAM AT A GLANCE

### SUNDAY 23 SEPTEMBER

- |               |  |
|---------------|--|
| 15.00 – 17.00 | Registration Open  |
| 18.00 – 21.00 | Welcome Reception: ‘An Evening in Montreal’ – Cocktails, Food Stations, Music & Colleagues |

### MONDAY 24 SEPTEMBER

- |               |   |
|---------------|---|
| 07.00 – 08.30 | Registration & Breakfast  |
| 08.30 – 08.35 | Opening Remarks by the 2018 CIAA Conference Director<br>Jason Christopherson, Chief Financial Officer, Mutual Fire Insurance  |
| 08.35 – 09.30 | Keynote Speaker: Glen Hodgson, International Economist and Author   |
| 09.30 – 09.45 | Morning Break   |
| 09.45 – 10.45 | The Transforming Insurer<br>Chris Reid, Vice President, Digital Distribution, Intact Insurance  |
| 10.45 – 11.15 | Urgency on Planning for Catastrophes<br>Senator Scott Tannas, Founder, Western Financial Group  |
| 11.15 – 11.45 | Annual General Meeting  |
| 11.45 – 13.00 | Buffet Lunch  |
| 13.00 – 14.30 | CEO Panel – Moderator: Andre Dugal, KPMG<br>Serge Lavoie, Echelon General Insurance<br>Paul Raymond, Alithya<br>Bernard Deschamps, Mutuelle des Municipalites du Quebec |
| 14.30 – 14.45 | Afternoon Break   |
| 14.45 – 15.45 | State of Canadian Auto Insurance<br>Liam McFarlane, Partner, Insurance and Actuarial Advisory Services, EY  |
| 15.45 – 16.45 | Accounting Update by PwC; Kyle Snyder & Owen Thomas   |
| 17.45 – 22.00 | Dinner & Evening Entertainment  |

## PROGRAM AT A GLANCE

### TUESDAY 25 SEPTEMBER

07.00 – 09.00	Registration & Breakfast
08.30 – 10.00	CIO Panel – Moderator: David Kerr, Deloitte Jennifer Baziuk, Commonwell Matthew Forristall, RSA Huw Morgan, Economical
10.00 – 10.15	Morning Break
10.15 – 11.15	Data-driven Portfolio Analysis Tom Marlatt, Global Insurance Solutions – UKI, EU, & Canada, Clearwater Analytics
11.15 - 12.15	Intelligent Process Automation François Gaudreau, Partner & the National Lead for Intelligent Automation, KPMG
12.15 – 13.00	Lunch 'To-go'
14.00 – 17.00	Networking Activities: Join your colleagues and learn a new skill!
18.00 - 22.00	Reception, Gala Dinner and CIAA Awards

### WEDNESDAY 26 SEPTEMBER

07.00 – 09.00	Breakfast
08.30 – 10.00	CFO Panel – Moderator: Akif Siddiqui, PwC Nigel Ayers, AIG Canada Earlene Huntley, CAA Jim Abernethy, Marsh
10.00 – 10.15	Morning Break
10.15 – 11.00	Managing Change and Talent through Finance Transformation Geoff Shields, SVP Insurance, Strategic Resource Consultants
11.00 – 12.00	Closing Keynote: Alexandre Bilodeau, Olympian; Consultant, Deal Advisory Services, KPMG
12.00	Conference Close - See you in Saskatoon in 2019!

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## OUR EXPERTS



**JIM ABERNETHY**  
**EVP & CFO, Marsh**

Jim has served as Past President, Treasurer and Conference Director of the CIAA as well as Past Tax Chair for the Insurance Brokers Association of Canada. He is a Past Director for the Toronto Board of Trade, and is the current Chair of the Board of Trade Audit Committee. He joined Marsh & McLennan Limited in 1986 as Assistant Controller. He was promoted to Controller in 1988. In 1989, he was appointed Vice President and in 1995, Senior Vice President. In 2000, Jim was promoted to CFO and was subsequently appointed Managing Director that same year. In 2004, he was appointed Executive VP, assuming additional responsibilities for Information Technology, Corporate Marketing & Communications, as well as providing leadership for business planning and execution strategies. In 2005, he was appointed COO, with added responsibilities including Corporate Compliance. In 2012, Jim reassumed the role of CFO.



**NIGEL AYERS**  
**CFO, AIG Insurance  
Company of Canada**

Nigel is responsible for providing financial analysis, advice and support to the Canadian business leadership team, for ensuring all reporting and taxation requirements are met, for local capital management and for leading the Canadian Finance function. He joined AIG Canada in 2013 as Chief Risk Officer (CRO) and was responsible for oversight of risks from all sources within the Canadian business. As CRO, he implemented the AIG risk management framework in Canada, set up the local risk governance structure, and was responsible for reporting to the Board of Directors and OSFI in relation to risk matters. Before joining AIG, Nigel spent 25 years with Zurich Insurance, mainly in Finance roles; from 2002 – 2012 he served as CFO in Canada, prior to that, he held business controllership and operational roles within the Company's commercial divisions. He also spent several years with Zurich Life Insurance Company holding the positions of VP Finance and VP of Corporate Development. Nigel qualified as a chartered accountant with PwC in the UK before moving to Canada, where he initially worked for several years as an audit manager with Ernst & Young in Toronto before joining Zurich.

# INNOVATION LANDSCAPE

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2018

## OUR EXPERTS



**JENNIFER BAZIUK**

**VP IT, The Commonwell Mutual Insurance Group**

Jennifer joined The Commonwell Mutual Insurance Group as VPIT in May of 2017. Prior to joining The Commonwell, she spent 20 years working in the Property & Casualty Industry for TD Insurance in both Toronto and Montreal. She has held a variety of leadership roles in Claims, Operations, Sales Effectiveness and Data Management & Data Governance. As VP of IT she provides strategic direction and leadership for the continued development of an innovative, robust and secure information technology environment throughout The Commonwell. She holds a Post Baccalaureate Diploma in Management, Business Management and Marketing, and a Masters of Business Administration. She is also a Project Management Professional and Certified Insurance Professional who has previously volunteered with Insurance Institute of Ontario. In addition to other charitable leadership roles, she takes a special interest in yoga, mindfulness and learning about leadership and employee engagement.



**ALEXANDRE BILODEAU**  
**Olympian; Consultant,  
Deal Advisory Services,  
KPMG**

When Alex became the first Canadian athlete in history to win a gold medal on Canadian soil in 2010 Vancouver Olympics, he captured the imagination of an entire nation. In 2014, he took part in his last Olympics, where he successfully defended his title with fierce determination, becoming the first repeat Canadian Olympic champion - forever a double Olympic champion. A native of Rosemère, Quebec, he first fell in love with freestyle skiing when watching Jean-Luc Brassard compete. Following in his idol's footsteps, he became the top Canadian junior in freestyle at age 14, but his career wasn't always tinged with glory and at times when others would have quit, Alex rolled up his sleeves and worked twice as hard. When he shares this story, he talks about the values that took him to the highest peaks of his sport. Alex now works as a professional in accounting and finance, specifically in the area of transactional services for KPMG. He intends to leave his mark in the business world. With "dare to dream big" as his watchword, there is every reason to believe he will be just as successful there.

## OUR EXPERTS



**BERNARD DESCHAMPS**  
**CEO, Mutuelle des Municipalités du Québec**

Bernard is an accomplished executive, strategic thinker and business developer. With over 25 years of proven accomplishments, he has been involved with start-up, SME and corporate environments. As part of his past and current mandates, he had to ensure compliance with the regulators while growing profitable business. He's developed unique skills to align stakeholders' interests and optimize partners' contributions. As a result, Bernard benefits from an extensive network and knowledge of the Canadian insurance landscape and a robust management experience. Currently the CEO of a specialty mutual insurance company dedicated to public organizations, he also serves as Chairman of the Audit Committee of a self-insurance fund and as a member of the professional liability insurance committee of CPA Canada. Bernard holds a Master in Public Administration, a post graduate certificate in accounting and is Certified Corporate Director.



**ANDRE DUGAL**  
**Partner, Audit**  
**KPMG**

André has more than 32 years of experience in audit and business consulting. He is Partner in Audit and assumed the responsibilities of Partner in charge of Accounting Advisory Services in Québec and Professional Practice Partner-Audit for the Montréal Office. He serves as a specialist on auditing matters and facilitates arbitration within the Business Unit of technical auditing issues. André was co-responsible for the International Financial Reporting Standards (“IFRS”) Conversion/Advisory work for the Montréal office and also responsible for the coordination of engagements relating to internal control over financial reporting (SOx 404 and MI 52-109). André is a member of KPMG’s IFRS Technical Topic Specialist Team on the presentation of financial statements. He currently acts as an adviser to a number of major companies on financial matters, SOx 404, IFRS and Corporate Governance.

## OUR EXPERTS



**MATTHEW FORRISTALL**  
**VP Application  
Delivery, RSA Canada**

With over 20 years of experience in IT and the insurance industry Matthew has held leadership roles in Operations and IT and is now responsible for all application development, quality assurance, and information and data management across RSA Canada. Matthew has led IT teams through many key acquisitions, corporate partnerships, and IT transformations with close partnership to the business operations for personal, commercial, and travel insurance via broker and direct channels.

Matthew holds a Bachelor of Science degree in Computer Science and Biology from Memorial University of Newfoundland.



**FRANCOIS GAUDREAU**  
**Partner, KPMG**

François is a KPMG Partner and the National Lead for Intelligent Automation. He has a unique combination of business and technical skills, and has successfully delivered Digital Labour programs across a variety of industries.

Digital labour and digital transformation are now top of mind on the executive agenda at many of our clients, and some have already embarked on their digital labour journey. RPA made its debut in Canada in 2016 in the financial services industry. With successful implementations and a return on investment averaging less than one year, it quickly propagated to multiple industries. Now the demand for RPA professional services is booming and its forecast is highly promising, as it is a key pillar towards more Intelligent Automation and Artificial Intelligence.

# INNOVATION LANDSCAPE

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2018

## OUR EXPERTS



**GLEN HODGSON**  
**International Economist &  
Author; Fellow, Conference  
Board of Canada**

Glen has over 35 years of experience in global and Canadian macro-economics, international trade and finance, fiscal and tax policy, and other “big picture” topics. He is the first-ever Senior Fellow at The Conference Board of Canada, after spending twelve years as the Board's Senior Vice-President and Chief Economist. His career has spanned the International Monetary Fund, in Washington DC, the federal Department of Finance, Export Development Canada, as well as the Conference Board of Canada. He has travelled the world and Canada as a financial negotiator, economic thinker, and advisor to governments and int'l organizations. He has published two books, one on the 2008 global financial crisis; the other on the business economics of pro sports. He's written over 350 reports, briefings and articles, shares regular commentary in the Globe & Mail, and delivers many speeches and presentations each year to clients. He's led organizations and served on boards. He's also a member of Canada's Ecofiscal Commission, which undertakes research on using price signals to discourage negative outcomes like greenhouse gas emissions or road congestion, and encourage positive ones.



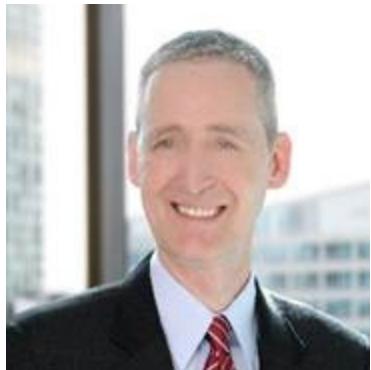
**EARLENE HUNTLEY**  
**CFO & Chief Risk Officer,  
CAA Club Group**

Earlene joined CAA in 2014 as Director, Tax, was promoted to AVP Tax in 2016, and to her current role in February of 2017. She's currently responsible for overseeing all aspects of Finance. Prior to joining CAA Club Group, Earlene worked at PwC (in both Toronto and Saint Lucia). She has spent the majority of her career in the hospitality and financial services industry. Before joining CAA, she was a Senior Manager Financial Services Tax responsible for compliance and advisory services for Life and P&C companies. Earlene is a graduate of the University of the West Indies where she earned her Bsc. Accounting (Hons) and is a Fellow of the Association of Chartered Certified Accountants in the UK. She has been a member of CIAA for a number of years and joined their Board of Directors in 2016. Her other interests include travelling.

# INNOVATION LANDSCAPE

CIAA  
2018

## OUR EXPERTS



David is a Partner in Deloitte Canada's Technology Consulting practice. He is an insurance industry and technology leader with 30+ years experience in emerging technology, industry solutions, business and market development, project delivery, strategic consulting, various forms of outsourcing, team building and leadership. He has previously held leadership roles at IBM and Accenture in Canada and abroad. David received a Honours Bachelor of Arts in Economics and Applied Studies from the University of Waterloo in 1985.

**DAVID KERR**  
**Partner, Deloitte**



Serge was appointed President of Echelon Insurance in November 2015. Prior to his appointment, he had served on the Company's Board of Directors since May 2014. He has over 25 years of experience in the insurance industry, previously serving as Chief Executive Officer and President at JEVCO Insurance Company. Throughout his career, he has served on a number of boards and committees, including the Canadian Insurance Claims Manager Association (CICMA) and the Groupement des Assureurs Automobiles (GAA). Serge holds a Bachelor of Commerce degree from the Quebec University of Montreal.

**SERGE LAVOIE**  
**President & CEO,**  
**Echelon Insurance**

## OUR EXPERTS



Tom has been with Clearwater since 2011. He specializes in helping global insurers maximize the efficiency of their investment accounting and reporting processes by solving challenges associated with integration, reporting, and accounting. He provides expert insights into the world of investment accounting, best practices, and industry updates and changes. Tom often facilitates collaboration between investment accounting teams and key stakeholders, finding portfolio management solutions that apply for all teams involved in the investment accounting process.

### THOMAS MARLATT

**Global Insurance Solutions –  
UKI, EU, and Canada  
Clearwater Analytics**

Tom has a bachelor's in accountancy from Boise State University.



Liam has 30 years of experience in the Canadian property and casualty insurance and reinsurance industry. Before joining EY in 2009, he gained extensive experience as a senior insurance executive, and as a consulting actuary working with insurers, reinsurers, captives, professional associations and financial institutions across most of the major lines of insurance in Canada. He's been involved in the evaluation of all major automobile insurance reforms in the Canadian marketplace since the early 1990's; Liam was active in evaluating the impact of the changes on premiums, creating revised rating structures, filing revised rates as required by various rate regulatory bodies and, from time to time, appearing at hearings in support of proposed changes. Liam currently acts as Appointed Actuary to approximately 10 insurance and reinsurance companies in the Canadian market both domestic and foreign branches. He has deep expertise in the valuation of policy liabilities as well as the assessment of financial condition through Dynamic Capital Adequacy Testing. He continues to assess the impact of automobile insurance regulatory changes on expected costs from a pricing and valuation perspective on behalf of a number of clients.

**LIAM MCFARLANE**  
**Partner, Insurance and  
Actuarial Advisory  
Services, EY**

# INNOVATION LANDSCAPE

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## OUR EXPERTS



**HUW MORGAN**  
**VP, Architecture and  
Business Enablement &  
Chief Architect,  
Economical**

Huw is a collaborative and innovative leader with more than 20 years experience in working with senior levels of management at large financial and public sector organizations. At Economical, he is responsible for the overall technology portfolio, the alignment of the business objectives to technology target state and Big Data Operations. He appreciates seeing business, technology people come together to do exciting, new things. There is nothing more rewarding than having a team work together towards a common goal.

Prior to his role at Economical Insurance, Huw was the Head of Architecture and Strategy at RBC and the Chief Architect for the City of Toronto. as Chief Architect at the City of Toronto where he spearheaded the creation of the electronic service delivery architecture enabling on-line access to services for the residents, visitors and businesses of the City. Huw lives with his wife and daughter in the Beaches neighbourhood in Toronto.



**PAUL RAYMOND**  
**President & CEO, Alythia**

A Computer Engineering graduate from the Royal Military College of Canada and member of the OIQ (Ordre des ingénieurs du Québec) and the Institute of Corporate Directors, Paul has more than 30 years experience in the business world. Prior to becoming President and CEO of Alithya in 2011, this visionary held several key senior management positions in a global information technology firms and as an officer in the Canadian Armed Forces. These functions have led him to travel to and reside in many parts of Europe, the US, and Canada. Paul is a strategic thinker who is guided by human values, which he shares with his team. In addition to overseeing Alithya's organizational development and accelerated growth, he is also the custodian of its values and culture, which he actively promotes in all geographies where Alithya operates. A strong believer in social responsibility, he encourages all Alithya employees to contribute time and money to the causes that are dear to them. He advocates for diversity of the workforce, and is very committed to the development of digital education and academic perseverance. The future will be digital, let us prepare our children now.

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CIAA  
2018

## OUR EXPERTS



**CHRIS REID**  
**VP, Digital Distribution,**  
**Intact Insurance**

Chris is Vice President, Digital Distribution for Intact Insurance. In this new role, Chris is responsible for growing the digital sales channel and client experience from coast to coast. Chris has been with the organization eight years and has held a number of roles in strategy, distribution and marketing. Chris was instrumental in establishing Intact Ventures, Intact's corporate venture capital and innovation arm in 2015 and lead a number of early investments in companies Metromile and Turo. Recently Chris also helped lead partnerships and product development for the sharing economy with companies like Uber.

Chris has a Bachelor of Commerce in Marketing and Finance of the Ted Rogers school of Management and holds a post-graduate certificate in business innovation from the University of Toronto.



**GEOFF SHIELDS**  
**SVP Insurance, Strategic**  
**Resource Consultants**

Geoff brings over 20 years of insurance industry leadership experience and expertise to Strategic Resource Consultants, along with an extensive network of insurance executives and professionals. Prior to joining SRC, he held senior leadership positions in the insurance industry: CFO for Kanetix Ltd; SVP Finance & Strategy for Aviva Canada; and CFO for Chubb Insurance Company of Canada. He's led high-performing teams across a wide range of disciplines, including Finance, Strategy, Risk, Compliance, Actuarial, Technology, Human Resources and Operations, and has worked with senior leaders in all functional areas and across the industry. He's also provided financial and operational consulting services as an independent consultant to various organizations, primarily in the insurance sector. Geoff holds a BBA degree from York University and is a Chartered Accountant. Geoff has long been an advocate of professional development in the insurance industry, and is a regular moderator and speaker at industry conferences and seminars.

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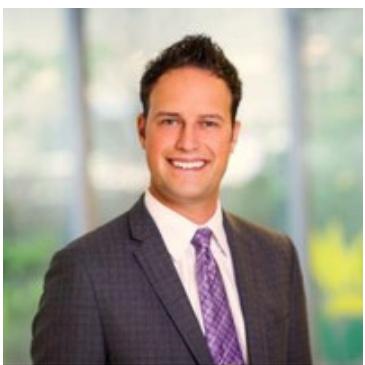
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## OUR EXPERTS



**AKIF SIDDIQUI**  
**National Insurance  
Assurance Leader, PwC**

As a CPA and a change agent, Akif have has a keen interest in the future of audits and remains involved with transformations and developments. He is a member of CPA Canada and Pakistan and a Partner in PwC's Insurance Assurance Practice. He brings diversified experience from 20 years working in assurance and advisory services in Pakistan, United Arab Emirates and Canada. Akif joined PwC's insurance assurance practice in 2002 and has extensive experience in serving property and casualty insurance companies. Akif has developed a strong understanding of insurance products and their accounting treatment under IFRS and is actively working with our clients through their transition to IFRS 17. Along with the responsibility of managing audits and maintaining relationships, Akif has reviewed accounting systems designed specifically for insurance products, considering the design and operation of the internal controls and recording of these transactions to comply with accounting standards. He also has experience in auditing various regulatory reports for his clients.



**KYLE SNYDER**  
**Audit Senior Manager,  
PwC**

Kyle has over 10 years of audit and advisory experience focused on the insurance industry. He also spent two years in PwC's assurance practice in the United Kingdom, working primarily on the audit of a global insurer. His experience includes technical accounting, IFRS conversions, audits of complex internal control and IT environments, advisory services and regulatory compliance and reporting for a wide range of insurance clients in both Canada and the United Kingdom. He has a strong understanding of insurance products and related risks for both P&C and Life insurance sectors.

Kyle attends and has presented at the CIAA event, including a presentation on IFRS 17.

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CIAA  
2018

## OUR EXPERTS



**Senator SCOTT TANNAS**

**Founder, Western Financial Group**

Scott is Founder of Western Financial Group Inc. (Western), having served as its CEO from 1996 to 2014. He oversaw the building of Western, through more than one hundred acquisitions, and a number of strategic initiatives. Today, it's a diversified financial services organization, with more than \$1B in annual sales. 1400+ employees provide nearly 1 million customers with insurance and investment products and services. The company's network stretches across the West from Winnipeg to the Pacific coast. Scott remains active in an advisory capacity at Western Financial Group, and has a number of business interests including Rocky Mountain Dealerships Inc where he serves as Lead Director. His most recent project is in the Private Equity business, where together with a number of Alberta business leaders he recently launched The Western Investment Company of Canada Limited. He serves as the President & CEO of the fledgling organization as it builds a portfolio of strong, stable and profitable businesses in Western Canada. In addition to his business activities, Scott is active in public service. Following a Province-wide Senatorial election, Prime Minister Harper appointed him to the Senate of Canada, where he serves on a number of important committees, including Banking Trade and Commerce, Internal Economy Budgets and Administration, and Aboriginal Affairs.



**OWEN THOMAS**

**Partner, PwC**

Owen is a Partner in PwC's Financial Services practice with over 15 years experience. He provides audit and advisory services to financial services clients, with a focus on insurance companies., and specialises in bringing clarity, insights and a practical approach to solving complex accounting matters. He's extensively involved in the new IFRS 17 insurance accounting standard, working with clients to understand and navigate the new requirements in their transition projects. He works primarily with Canadian public companies, property and casualty insurers, life insurers, and other regulated financial institutions including banks and asset management companies. He's a member of the Canadian Accounting Standards Board IFRS 17 Transition Resource Group, the OSFI IFRS 17 Auditor Working Group and other IFRS 17 industry and PwC global working groups. Owen began his career in the UK, working with insurers in the London market, including Lloyd's and Solvency II reporting. He is a regular presenter on IFRS accounting developments at client and industry training courses and events. He has a BA (Hons) Accounting and Finance degree from the University of Exeter, UK.

# INNOVATION LANDSCAPE

CIAA  
2018

## 2018 SPONSORSHIP OPPORTUNITIES

This year's conference not only has impressive speakers - Keynotes Glen Hodgson and Alexandre Bilodeau are just two great examples - but fantastic social programs AND the introduction of our brand new CIAA Awards Program.

SEPT 23 - 26, 2018  
Canadian Insurance Accountants  
**C I A A**  
ASSOCIATION

Enjoy the popular CEO and CFO panels and attend thought-provoking discussions about the latest industry innovations, trends and changes from the experts at EY, Intact Insurance, PwC, KPMG Clearwater Analytics, Deloitte and more.

### GOLD

**\$3,500**

Sponsor our keynote speakers, app, or conference program. Sponsors receive signage at the conference, their logo in the program and on the website, with a live link.

### SILVER

**\$2,500**

Help defray costs of cocktail receptions, dinner wines and evening entertainment! Sponsors receive signage at the conference, their logo in the program and on the website, with a live link.

### BRONZE

**\$1,500**

Help defray costs of breakfasts & coffee breaks. Sponsors receive signage at the conference, their logo in the program and on the website, with a live link.

