

# 2025 DELEGATE REGIONAL FORUM HIGHLIGHTS

We are pleased to share the highlights from the **winter 2025 Delegate Regional Forums**, which took place virtually with Co-operators and our member organizations from **January 14 to January 28, 2025**.

We thank you all for your attendance and participation!

All documents and presentations will be available on the [member website](#).

A link to the online evaluation survey was sent to all delegates following their respective meetings. If you have not already done so, please complete it as soon as possible – the comments and feedback provided are greatly appreciated and help us continually improve the meetings.

[Evaluation Survey](#)

## A Welcome from John and Rob

**Rob Wesseling, President & Chief Executive Officer**, and **John Harvie, Chairperson of the Board**, joined each bringing their greetings and providing answers to some great questions posed by delegates.

In his remarks Rob highlighted the escalating climate change threat and its subsequent impacts in Canada. He emphasised this growing challenge as a key reason to focus on enhancing resilience-for our business, for our clients, and for our Canadians.

**John Harvie, Chairperson of the Board**, \* focused his remarks on the board of directors and the cultural and regional diversity the 22 directors bring to the governing of the organization. He reflected on the some of the challenges and opportunities that have arisen during his tenure with the organization and shared that co-operation has remained at the core of management and the board coming together for solutions.

\*In Quebec John was joined by **Robert Moreau, Vice-Chairperson of the Board**, to deliver greetings on behalf of the board in French.



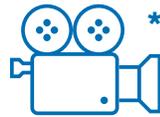
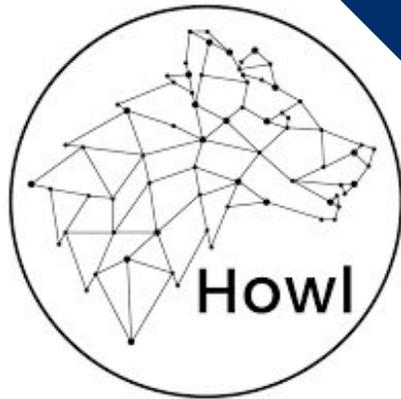
# Board of Directors Report

The directors delivered a brief presentation highlighting governance over the last few months of 2024 including strategy highlights, risk oversight and the biennial director and board committee chairperson assessment program.

## Co-operators Community Fund (CCF) update

**Paul Hanna, Executive Vice-President, Member Relations, Governance, & Corporate Services,** shared a brief overview of the CCF and provided information on the process and delegate terms for serving on the CCF (Non-Profit) and CCF (Charity) Board of Directors. The committees learned about our **Indigenous Youth Employability Initiative (IYEI)** and watched a [video highlighting one of the IYEI partners, The Howl Experience.](#)

\*\* In Quebec Francois Hastir, CGL Director and representative on the CCF board) gave the CCF update.



\*Click icon to watch Howl video

## Education Session

### The Transformative Journey of Advisors

**Mark Kent, Sherri Ryckman** and **Sarah Walker, Associate Vice-Presidents, Sales Operations** and **Veronique Di Vito, AVP Quebec Operations** along with **Patrick Decarie, Region Vice-President, Quebec,** presented the education session for the regional forums on the journey of transformation our advisor force is undertaking.

They engaged the committees in understanding the changing landscape and evolving client preferences for products and services to support their financial security, and shared the challenges faced by our advisors in meeting those needs.

## Feature Member

In the spirit of co-operative principle 6: **co-operation amongst co-operatives**, we encourage our members to share and hear from one-another at the regional meetings. In all regions, the **'Feature Member Presentations'** provided an in-depth overview of a member organization and some key initiatives they are currently undertaking.

## Director Elections

**Brigitte Catellier, Vice-President, Chief Governance Officer and Corporate Secretary,** led each meeting through a review of Co-operators board of director nominations and elections.

The following individuals were nominated as the director-elects to the 2025 AGM:

- BC:** Shelley McDade (CU), John Kay (at-large)
- AB:** Tim Hofstra (at-large)
- ON:** Reba Plummer, Mark Reusser (both at-large)
- QC:** Jessica Provencher (at-large)
- ATL:** Shanti Samaroo (at-large)

## Contact Us

For more on information on materials covered at the Delegate Regional Forum, including these Highlights, meeting materials, presentations, and other documents, please visit the [Member Website](#) under Meetings/Region Committee Meetings.

The [Member Website](#) can be found on [www.cooperators.ca](http://www.cooperators.ca) under the **About Us** tab. Each delegate, alternate, and corporate secretary was provided an individual username and password. If you have any difficulty accessing the site, please contact us: [the\\_co-operators\\_member\\_relations@cooperators.ca](mailto:the_co-operators_member_relations@cooperators.ca).

## Your Feedback Matters

If you have any other suggestions on topics for Delegate Education, agenda items, or additional comments on how we can continue to ensure the success of region meetings, please complete the [Evaluation Survey](#)!

## Future Meeting Dates

### 2025 Annual General Meeting

Our **2025 AGM** will be held in-person from **April 1<sup>st</sup> to 3<sup>rd</sup>** at **Toronto Airport Marriott Hotel**. We are excited see you all there!



Together we look forward to celebrating the **International Year of Co-operators** and **Co-operators 80th anniversary**. For the Welcome reception on the evening of the 1<sup>st</sup> we're having some fun with our history and **asking participants to dress up from their favourite decade of the last 80 years**.

### Fall 2025 Region Committee Meetings

Region	Date	Time	Location
<b>ON</b>	Monday, November 10, 2025	9:00am - 3:30pm ET	Toronto
<b>BC</b>	Wednesday, November 12, 2025	9:00am - 3:30pm PT	Vancouver
<b>AB</b>	Thursday, November 13, 2025	9:00am - 3:30pm MT	Edmonton
<b>MB</b>	Tuesday, November 18, 2025	9:00am - 3:30pm CT	Winnipeg
<b>SK</b>	Thursday, November 20, 2025	9:00am - 3:30pm CT	Saskatoon
<b>QC</b>	Tuesday, November 25, 2025	9:00am - 3:30pm ET	Montreal
<b>ATL</b>	Thursday, November 27, 2025	8:30am - 3:00pm AT	Halifax

### Winter 2026 Delegate Regional Forums

Region	Date	Time
<b>BC</b>	Tuesday, January 13, 2026	8:45am - 12:00pm PT
<b>SK</b>	Thursday, January 15, 2026	8:45am - 12:00pm CT
<b>AB</b>	Friday, January 16, 2026	8:45am - 12:00pm MT
<b>MB</b>	Tuesday, January 20, 2026	8:45am - 12:00pm CT
<b>ON</b>	Wednesday, January 21, 2026	8:45am - 12:00pm CT
<b>ATL</b>	Thursday, January 22, 2026	9:45am - 1:00pm AT
<b>QC</b>	Tuesday, January 27, 2026	8:45am - 12:00pm ET

*\*All meetings will be hosted virtually*

# Board of Directors Report

The directors delivered a brief presentation highlighting governance over the last few months of 2024 including strategy highlights, risk oversight and the biennial director and board committee chairperson assessment program.

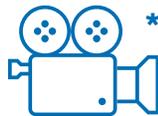
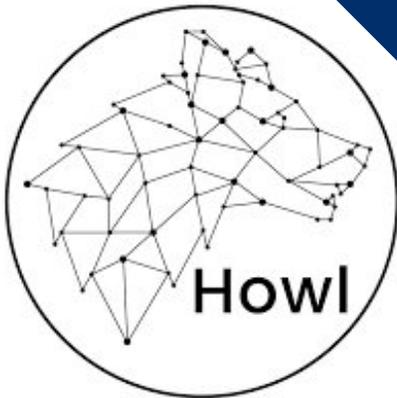
## Co-operators Community Fund (CCF) update

**Paul Hanna, Executive Vice-President, Member Relations, Governance, & Corporate Services,**

shared a brief overview of the CCF and provided information on the process and delegate terms for serving on the CCF (Non-Profit) and CCF (Charity) Board of Directors. The committees learned about our

**Indigenous Youth Employability Initiative (IYEI)** and watched a [video highlighting one of the IYEI partners, The Howl Experience.](#)

\*In Quebec Francois Hastir, CGL Director and representative on the CCF board) gave the CCF update.



[\\*Click icon to watch Howl video](#)

## Education Session

### The Transformative Journey of Advisors

**Mark Kent, Sherri Ryckman** and **Sarah Walker, Associate Vice-Presidents, Sales Operations** and **Veronique Di Vito, AVP Quebec Operations** along with **Patrick Decarie, Region Vice-President, Quebec,** presented the education session for the regional forums on the journey of transformation our advisor force is undertaking.

They engaged the committees in understanding the changing landscape and evolving client preferences for products and services to support their financial security, and shared the challenges faced by our advisors in meeting those needs.

## Feature Member

In the spirit of co-operative principle 6: **co-operation amongst co-operatives**, we encourage our members to share and hear from one-another at the regional meetings. In all regions, the **'Feature Member Presentations'** provided an in-depth overview of a member organization and some key initiatives they are currently undertaking.

## Director Elections

**Brigitte Catellier, Vice-President, Chief Governance Officer and Corporate Secretary,** led each meeting through a review of Co-operators board of director nominations and elections.

The following individuals were nominated as the director-elects to the 2025 AGM:

- BC:** Shelley McDade (CU), John Kay (at-large)
- AB:** Tim Hofstra (at-large)
- ON:** Reba Plummer, Mark Reusser (both at-large)
- QC:** Jessica Provencher (at-large)
- ATL:** Shanti Samaroo (at-large)

## Contact Us

For more on information on materials covered at the Delegate Regional Forum, including these Highlights, meeting materials, presentations, and other documents, please visit the [Member Website](#) under Meetings/Region Committee Meetings.

The [Member Website](#) can be found on [www.cooperators.ca](http://www.cooperators.ca) under the **About Us** tab. Each delegate, alternate, and corporate secretary was provided an individual username and password. If you have any difficulty accessing the site, please contact us: [the\\_co-operators\\_member\\_relations@cooperators.ca](mailto:the_co-operators_member_relations@cooperators.ca).

## Your Feedback Matters

If you have any other suggestions on topics for Delegate Education, agenda items, or additional comments on how we can continue to ensure the success of region meetings, please complete the [Evaluation Survey](#)!

## Future Meeting Dates

### 2025 Annual General Meeting

Our **2025 AGM** will be held in-person from **April 1<sup>st</sup> to 3<sup>rd</sup>** at **Toronto Airport Marriott Hotel**. We are excited see you all there!



Together we look forward to celebrating the **International Year of Co-operators** and **Co-operators 80th anniversary**. For the Welcome reception on the evening of the 1<sup>st</sup> we're having some fun with our history and **asking participants to dress up from their favourite decade of the last 80 years**.

### Fall 2025 Region Committee Meetings

Region	Date	Time	Location
<b>ON</b>	Monday, November 10, 2025	9:00am - 3:30pm ET	Toronto/Guelph
<b>BC</b>	Wednesday, November 12, 2025	9:00am - 3:30pm PT	Vancouver
<b>AB</b>	Thursday, November 13, 2025	9:00am - 3:30pm MT	Edmonton
<b>MB</b>	Tuesday, November 18, 2025	9:00am - 3:30pm CT	Winnipeg
<b>SK</b>	Thursday, November 20, 2025	9:00am - 3:30pm CT	Saskatoon
<b>QC</b>	Tuesday, November 25, 2025	9:00am - 3:30pm ET	Montreal
<b>ATL</b>	Thursday, November 27, 2025	8:30am - 3:00pm AT	Halifax

### Winter 2026 Delegate Regional Forums

Region	Date	Time
<b>BC</b>	Tuesday, January 13, 2026	8:45am - 12:00pm PT
<b>SK</b>	Thursday, January 15, 2026	8:45am - 12:00pm CT
<b>AB</b>	Friday, January 16, 2026	8:45am - 12:00pm MT
<b>MB</b>	Tuesday, January 20, 2026	8:45am - 12:00pm CT
<b>ON</b>	Wednesday, January 21, 2026	8:45am - 12:00pm CT
<b>ATL</b>	Thursday, January 22, 2026	9:45am - 1:00pm AT
<b>QC</b>	Tuesday, January 27, 2026	8:45am - 12:00pm ET

*\*All meetings will be hosted virtually*