

Women

of influence in Canada's life insurance industry

Three independent advisors are recognized for their energy, talents and determination toward the same goal – the financial security of Canadians.

In the last 35 years, women have made considerable strides in the insurance industry – more often, they're being promoted to traditionally male-dominated roles, starting their own insurance practices, and building their reputation as respected and trusted advisors. In *The Insurance and Investment Journal's* recently published article, *50 Women of Influence in Canada's Life Insurance Industry*, three advisors associated with the Independent Advisor Channel were highlighted for their achievements: Heather Courneya, Cindy David and Diane Dupuis. In addition to financial advisors, Manulife's very own Marianne Harrison, Senior Executive Vice President and General Manager, Canadian Division, and Karen Cutler, Vice President and Chief Underwriter, were highlighted for their achievements.

Selected for having shown leadership in different sectors of the industry, including professional success, industry involvement and mentorship, we asked Heather, Cindy and Diane to share some of their accomplishments, challenges and secrets to success.

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Heather Courneya

**President
Jelco Financial Planning, Scarborough, Ont.**

Heather started as a file clerk in her father's insurance office in 1973 and, with plenty of hard work and patience, became the full owner of the practice seven years ago. Despite starting under his wing, Heather created her own path to success through continued education, professional designations (including Advocis and the Million Dollar Round Table) and involvement in the community. She became a Three Star Master Builder in 2013.

"Being a member of professional associations is incredibly important because of the fabulous people that you meet, the ideas that they introduce you to and the comradery and the energy you get from attending meetings."

What's most unique about Heather is she treats every opportunity with respect and appreciation. She wants to be part of something she can be proud of, so she handles every client and every situation with honesty, integrity and compassion.

"Women have a natural ability to connect with others... This business isn't just about numbers and solving problems, this business is about connecting and networking and really making a difference in people's lives." Heather explains that knowledge, empathy and understanding, good listening and communication skills are what set her apart and make her a success.



Diane Dupuis

**President and founder
The Dupuis Langen Group, Richmond, B.C.**

Having started her own firm 29 years ago with only one employee (her assistant), Diane Dupuis has grown her practice to include specialists in three distinct lines of business and relocated to a 6,000 square foot building in Richmond, B.C. to house all 14 of her employees (13 of which are women).

Diane sees no shortage of female professionals in her industry. She says, "It's not that I went out specifically looking to hire women, it's just that when we were hiring, the best candidates happened to be women."

In addition to her growing practice, Diane also has a laundry list of professional affiliations, designations, volunteer achievements and awards (she achieved her Five Star Master Builder status in 2006). Most recently, she won the BMO Women in Business Award for Community Involvement, in part due to establishing the ACT West Community Foundation last year, dedicated to helping women realize their dreams of post-secondary education.

"I'm hoping we receive charitable registration status from Canada Revenue Agency by the end of 2014; and, at the beginning of 2015, we can begin contributing a percentage of our group benefit revenue into a scholarship fund. Our goal is to fully educate Canadian women in need."



Cindy David

President

Cindy David Financial Group, Vancouver, B.C.

Cindy David has established a trusted reputation with more than just her clients – she’s also a frequent speaker at financial conferences, provides professional consulting and co-authored the book, *Financial First Aid for Canadian Investors: Stop the Bleeding, Start the Healing and Get Your Portfolio on the Road to Recovery*.

Cindy attributes her success to hard work and a commitment to education. When she first started in the industry at the age of 21, Cindy looked for ways to learn more about the business. Knowing the importance of networking, she took advantage of working in the same building as Diane Dupuis, Cindy explains, “I just called Diane to ask if she would be willing to give me a half an hour of time to pick her brain about business.”

Several years later, when returning from the 2010 Pinnacle conference in Bora Bora, they reconnected, starting a unique and rare partnership: Cindy provides many of Diane’s clients with estate planning services; Diane provides many of Cindy’s clients with group benefits services.

“People thought we were destined to fail as partners because we are two strong females in the industry. People would ask, ‘why do you need her?’ and the reality is I don’t. We don’t *need* each other; we *choose* each other. We have very complementary businesses. There’s no competition, just a lot of genuine support. The more successful she is, the more successful I am.”

Cindy adds, “People sometimes assume the worst of women in our situation, that we’ll be at each other’s throats; but we’re a really good example of professional, high achievers working well together.” ▣

Advice to young advisors looking to be successful in this business:

Cindy says, “Have thick skin, work hard, create your own goals (and never mind anyone else’s).”

Diane says, “Focus... It’s too complex a business to try and do a little bit of everything and give back.”

Heather says, “Do an honest day’s work every day, surround yourself with good, supportive people and educate yourself.”

Read about the accomplishments of all 50 of Canada’s most influential women in the insurance industry at insurance-journal.ca.