

**Rhona Konnelly CLU, CPCA, EPC
CIEPS Marketing Director & Faculty Member**

Rhona was one of the first women in Canada to enter the financial services industry with Sun Life Assurance Company of Canada in February of 1977. Over the past 4 decades, she has served as an Insurance Professional, amassing a wealth of diverse knowledge, experience and respect in the fields of insurance, financial and estate planning. She has served for many years in Senior Specialist and Directorship roles with some of Canada's leading financial services organizations, including Sun Life Financial, Investors Group, Nesbitt Burns, MD Management and Edward Jones.

She is also one of the first women to be elected and serve as Chapter President of the Life Underwriter's Association of Canada (currently Advocis), in Victoria, BC in 1987.

Rhona has held her Chartered Life Underwriter's Degree (CLU) for the past 25 years, and was recently honoured by the Institute for Advanced Financial Education in celebration of this milestone in 2023. Her desire to further specialize in serving the needs of Canada's growing elder marketplace led to the achievement of the Elder Planning Counselor (EPC) designation and Certified Professional Consultant on Aging (CPCA) designation in 2005. Both of these credentials build on her in-depth experience and assist her in advising elders and their families on the financial, social and health aspects of living in retirement.

Rhona is a sought after speaker at industry related conferences and symposiums across Canada and is currently serving as Marketing Director and Faculty Member for the Canadian Initiative for Elder Planning Studies (CIEPS) and the Elder Planning Counselor (EPC) certification program.

In addition to the attainment of her CLU, EPC and CPCA, Rhona has 7-years of total membership with the Million Dollar Round Table (MDRT); first year in 2001 and last year in 2014, with 2 Court of the Table (COT) memberships in 2001 and 2012. Rhona continues to serve in her community as an estate planning and elder care planning resource for the donors of TB Vets Charitable Foundation, is the original founder of the North Shore Chapter of CARP (A New Vision of Aging in Canada), and is the author of the handbook titled "The Referability Factor – The Art of Becoming Referable".

Rhona resides on Vancouver Island with her partner Steve.

In addition to being an Elder Care Advocate, she:

- * Is A Strategic Solutions Consultant in Insurance Excellence
- * Is A Justice Advocate for the Needs of Canada's Neglected and Abandoned Life
- * Insurance Policy Holders
- * Offers Preservation Solutions for Family Legacies
- * Is an Advisor Coach in Insurance Excellence