Rhona Konnelly CLU®, EPC®, CPCA, RFC®
EPC Marketing Director, Konnelly Consulting,

Rhona Konnelly is a respected Canadian financial services leader, educator, speaker, author, and advocate whose career spans five decades. Since beginning her career in life insurance in 1977, she has remained committed to advancing professional excellence, ethical leadership, and client-centered service.

Throughout her career, Rhona has held positions with several of Canada's leading financial institutions, including Sun Life, Investors Group, Nesbitt Burns, MD Management and Edward Jones. Her experience across insurance, investments, estate planning, retirement planning and elder planning has given her a broad perspective on the financial and human dimensions of helping individuals and families navigate life's changing circumstances.

Rhona currently serves as Executive Vice-President and Ethics Chair of the IARFC Canada Chapter and as Marketing Director and faculty member of the Canadian Institute for Elder Planning Studies (CIEPS). Recognized as one of Insurance Business Canada's Elite Women, she is also the creator of Canada's first Policyholder Servicing Charter and the author of The Referability Factor.

Her current work focuses on longevity planning, caregiving preparedness, policyholder advocacy and the future of professional financial advice. She is particularly passionate about helping professionals recognize the importance of conversations that extend beyond traditional financial and legal planning—conversations that help individuals and families prepare for changing needs, preserve independence and make informed decisions together.

Rhona believes the future of advice is not more advice—it is better stewardship.

Through her speaking, writing, consulting, and advocacy, she continues to champion a more thoughtful, collaborative and stewardship-based approach to helping financial professionals build practices defined by trust, ethical leadership, and lasting human relationships.