



KONNELLY CONSULTING

Empowering Futures, Rebuilding Trust



Passionate about helping Advisors to differentiate and strengthen their practices by harnessing the “gold mining opportunities” to elevate their insurance sales and increase their referability.

Rhona Konnelly, CLU, EPC, CPCA

Rhona was one of the first women in Canada to enter the financial services industry. 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 – where she was a member of a specialized team of planning experts that partnered with financial advisors to help address their client’s protection needs through three life stages – building for their future, protecting what they have worked for, and planning for their Legacy.

Rhona earned her Chartered Life Underwriter’s Degree (CLU) in financial services and estate planning in 1998. In 2005, Rhona received the Elder Planning Counselor (EPC) designation and Certified Professional Consultant on Aging (CPCA) designation; 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. She is a sought after speaker on these issues at industry related conferences and symposiums across Canada.

Rhona is a published faculty member at Ashton College, a private post-secondary educational institution, where she has taught a variety of industry related programs. 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” (second edition available September 2024).

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