

BrokerBot Names Financial Services Industry Veteran Kevin Dear as Chief Operating Officer

BrokerBot today announced the appointment of Kevin Dear as Chief Operating Officer and Product Owner.

OTTAWA, ONTARIO, CANADA, March 2, 2026 /EINPresswire.com/ -- [BrokerBot](#), the AI-powered client engagement platform built for Canadian financial services professionals, today announced the appointment of Kevin Dear as Chief Operating Officer and Product Owner. The appointment marks a defining moment for the company as it accelerates its mission to transform how mortgage brokers, real estate professionals, insurance advisors, and lending specialists build, engage, and retain client relationships across Canada.

Kevin Dear brings more than 28 years of leadership in financial services and fintech to BrokerBot. He began his career at TD, rising to Branch Manager before becoming Broker Owner of Origin Mortgages. In 2016, he played a pivotal role in the acquisition and transformation of Marlborough Stirling Canada Limited into Newton Connectivity Systems, where he became the Product Owner and VP of Broker Experience for Velocity, one of Canada's most widely adopted mortgage point-of-sale and submission platforms.

The announcement follows a recent successful closing of BrokerBot's Seed round, with Carriage House Wealth leading the investment. This new capital and Kevin's addition to the executive team will fuel BrokerBot's aggressive scaling efforts and drive its expansion across Canada's mortgage, real estate, insurance, and lending markets, where relationship-driven professionals increasingly need intelligent systems to compete and grow.

Under Kevin's leadership, Velocity grew from a regional CRM into a nationally recognized, lender-integrated submission ecosystem processing more than \$20 billion in monthly volume and serving brokers from coast to coast. What made Velocity's growth remarkable was not simply the scale it reached, but how it got there: built collaboratively with brokers, for brokers, by someone who understood the industry from the ground up.

"Kevin is exactly the kind of leader BrokerBot needs at this stage," said Scott Larter, Chief Executive Officer of BrokerBot. "He has done this before at scale. He knows the broker community deeply, he knows how to build products that get adopted, and he understands that the next competitive advantage in this industry isn't faster submissions — it's smarter, sustained client relationships. That is precisely what BrokerBot is built to deliver, and not just for mortgage

professionals. Real estate agents, insurance advisors, and lenders all face the same fundamental challenge: staying meaningfully connected with clients across a lifetime of financial decisions. BrokerBot is the platform that makes that possible."

Kevin joins BrokerBot at a pivotal moment for Canadian financial services. As rate cycles shift, competition intensifies, and consumer expectations rise, professionals across mortgage, real estate, insurance, and lending are recognizing that transaction-focused technology is no longer sufficient. The advisors and brokers who will win are those who engage clients intelligently across the full financial lifecycle: from first inquiry through purchase, renewal, refinance, protection planning, and beyond.

BrokerBot's platform addresses this challenge directly. Powered by artificial intelligence and behavioral data, BrokerBot enables financial services professionals to automate meaningful client communication, build predictable pipelines, and operate with the kind of systematic efficiency previously available only to enterprise institutions and large national networks. Whether the professional is a mortgage broker managing renewal cycles, a real estate agent nurturing long-term referral relationships, an insurance advisor tracking policy milestones, or a lender building lifetime client value, BrokerBot provides the intelligent engagement infrastructure to compete at the highest level.

"Velocity proved that when you build the right technology for the way professionals actually work, adoption follows," said Kevin Dear. "BrokerBot is solving the next layer of that equation. Submissions are transactional. Relationships are what build a sustainable business. I've spent nearly three decades watching great brokers and advisors leave significant revenue on the table simply because they didn't have the systems to stay connected at scale. BrokerBot changes that, across mortgage, real estate, insurance, and lending. I am proud to join this team and even more excited about what we are about to build together."

As COO and Product Owner, Kevin will lead BrokerBot's operational strategy, product roadmap, and client success initiatives, with a focus on translating the platform's AI capabilities into measurable revenue outcomes for financial services professionals across Canada.

Brad Cartier

BrokerBot

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