

## CAFII Regulator and Policy-Maker Visit Plan 2016-17

Jurisdiction Regulator/Policy-Maker	Last Meeting /Contact	Proposed Meeting	Topics/Purpose	Status Nov 7/16
<b>British Columbia</b>				
<b>Insurance Council of BC:</b> Gerry Matier, Executive Director	-June 29/16 informal discussion with B. Wycks at CISRO LLQP Session in Toronto -April 11/16 informal discussion with B. Wycks, at CISRO LLQP Info Session -Feb. 27/15 meeting in Toronto	None at this time	-Council's current view on 10-Year Review of Financial Institutions Act -Representation of alternate distribution/non-resident sellers on Council -Update on Council priorities	
<b>FICOM:</b> Frank Chong, Acting Superintendent of Financial Institutions (effective August 1/16)  Carolyn Rogers , former CEO, FICOM & Superintendent of Insurance (departed Aug 2016) (CCIR Vice-Chair)	-Nov 10/15 in Vancouver re CGI Information Bulletin  -Lunch meeting in Halifax on May 4/16	None at this time  On May 12/16, C. Rogers appointed OSFI's Asst. Supt, Regulation Sector, effective Aug 15/16. On June 8/16, CAFII Chair P. McCarthy sent congrats letter to C. Rogers	-Monitoring for appt. of interim or permanent FICOM CEO successor	
Doug McLean, Deputy Superintendent of Insurance	-No contact/meeting for at least past two years	None at this time	-FICOM Information Bulletin on CGI ('effecting' of CGI in BC issue) -10 yr. Review of BC Financial Institutions Act (if appropriate)	
Chris Carter, Acting Superintendent, Real Estate and Acting Registrar, Mortgage Brokers (effective August 1/16)	-April 14/16 teleconference re CAFII follow-up letter - Follow-up letter, seeking clarification on CGI Info Bulletin key issues, sent March 15/16  - Nov 10/15 in Vancouver	-follow-up teleconference in Q4 2016 on auto dealers are creditors for a moment-in-time issue, if CAFII makes legal opinion submission	- FICOM Information Bulletin on 'effecting' of CGI in BC issue (C. Carter has leadership responsibility for this issue, as advised by H. James on March 16/16)	Pending CAFII's legal opinion submission

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Lorena Dimma, Director, Market Conduct (assuming Harry James' former policy advisor role re 'effecting' of CGI issue)	-April 14/16 teleconference re CAFII's March 15/16 follow-up letter on CGI Info Bulletin	-See C. Carter above	-See C. Carter above	Pending (see C. Carter above)
Harry James, Senior Regulatory Advisor (Chair of CCIR's Travel Insurance Working Group)	-April 14/16 teleconference re CAFII's March 15/16 follow-up letter on CGI Info Bulletin	-See C. Carter above	-See C. Carter above. Although H. James is supposed to have handed this file to L. Dimma and C. Carter, he did most of talking in April 14/16 teleconference so CAFII will continue to include Harry in the discussions on "effecting" issue.	Pending (see C. Carter above)
Molly Burns, Analyst, Policy Initiatives	-April 14/16 teleconference re CAFII's March 15/16 follow-up letter on CGI Info Bulletin -Nov 10/15 in Vancouver	-See C. Carter above	-See C. Carter above	Pending (see C. Carter above)
Erin Morrison, Regulatory Analyst, Policy Initiatives	-August 10/16 in Toronto, accompanied Harry James and participated in CCIR TIWG meeting with CAFII	-See C. Carter above	-See C. Carter above	Pending (see C. Carter above)
<b>Ministry of Finance:</b> Michael de Jong, Minister of Finance	-Nov. 21/14: G. Grant represented CAFII at FIA Review roundtable discussion hosted by Minister	None at this time	TBD until CAFII has a "direct ask" at Ministerial level	
Dan Ashton, Parliamentary Secretary for Finance (elected MLA)	-November 10/15 in Vancouver along with Elizabeth Cole	If necessary, follow-up meeting in Q2 or Q3 2017 in Vancouver, after Policy Paper released	-Update on 10-year Review of Financial Institutions Act: follow-up on CAFII issues/concerns including recommendations of other stakeholders	Pending (see E. Cole below)
Elizabeth Cole, Executive Director, Strategic Projects & Policy (head of 10-Year Review of FIA)	-June 23/16 telephone conversation with B. Wycks re updates on expected release date of Policy Paper and other FIA Review timelines -November 10/15 in Vancouver along with Dan Ashton; and separate meeting along with Brian Dillon and Kari Toovey	If necessary, follow-up meeting in Q2 or Q3 2017 in Vancouver, after Policy Paper is released		Pending Ministry of Finance's release of Policy Paper

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Brian Dillon, Director, Financial Institutions		See E. Cole above		Pending (see E. Cole above)
Kari Toovey, Senior Policy Advisor		See E. Cole above		Pending (see E. Cole above)
<b>Alberta</b>				
<b>Alberta Insurance Council:</b> Joanne Abram, CEO;	<b>-Oct 31/16 CAFII submission of letter proposing definition of CGI critical illness insurance to be adopted for inclusion under existing RIA licence</b> -Sept 16 & 28/16 and Oct 11/16 e-mail correspondence with B. Wycks re LIC decision on allowing CI to be sold under an RIA licence -Sept 12/16 teleconference with G. Grant and B. Wycks -July 12/16 teleconference with G. Grant and B. Wycks -May 9/16 review update e-mail from J. Abram to B. Wycks -Feb. 10/16 CAFII letter to J. Abram - Jan/16 and Oct./15 e-mail exchanges with J. Abram	-if necessary, Q4 2016 teleconference or in-person meeting with AIC management or LIC	-CAFII's proposed definition of CGI critical illness insurance to be adopted for inclusion under existing RIA licence  -Representation for Restricted Licence Holders	Pending outcome of LIC views on CAFII input re definition

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Anthonet Maramieri, COO (succeeded Tom Hampton at beginning of 2015)	-Sept 12/16 teleconference with G. Grant and B. Wycks -July 12/16 teleconference with G. Grant and B. Wycks - April 11/16 informal discussion with B. Wycks, at CISRO LLQP Info Session - Feb 27/15: Toronto: B. Wycks met A. Maramieri and had get acquainted chat at CISRO LLQP Stakeholder Info Session	-See J. Abram above	-See J. Abram above	Pending (see J. Abram above)
Warren Martinson, Legal Counsel	-May/June 2016 telephone discussion with J. McCutcheon (on CAFII's behalf) re legislative and regulatory underpinnings of selling of CI benefits as credit-related insurance under an RIA licence -Feb 10/14: Toronto, ON (with B. Wycks, as W. Martinson then on LLQP Governance Ctte.)	-See J. Abram above	-See J. Abram above	Pending (see J. Abram above)
<b>Treasury Board and Ministry of Finance:</b>  Nilam Jetha, Acting Superintendent of Insurance (one year interim role)  Mark Prefontaine, Superintendent of Insurance (seconded to Senior Asst. Deputy Minister for one year, effective Jan. 11/16)	No contact – appointed Jan 11/16 (congratulatory letter sent Feb. 1/16)  -Sep 30/14; Fredericton, NB (informal meeting)	None at this time  Not applicable at this time	- Update on Superintendent's priorities -Communicate CAFII issues; build and strengthen relationship	
David Sorensen, Deputy Superintendent of Insurance	No face-to-face contact to date - <i>appointed Sep 15/14</i>	None at this time	See N. Jetha above	

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Laurie Balfour, Director, Financial Compliance, Insurance Regulation and Market Conduct Branch (Chair of CCIR Insurance Core Principles Implementation Ctte)	-Sep 30/14: Fredericton, NB (informal meeting) -Jul 28/14: call with CAFII reps re: "effecting of CGI"	None at this time	-See N. Jetha above	
Joe Ceci, President of Treasury Board and Minister of Finance	No contact – appointed May 24/15	None	TBD until CAFII has a "direct ask" at Ministerial level	
<b>Saskatchewan</b>				
<b>Insurance Councils of Saskatchewan:</b> Ron Fullan, Executive Director, (CISRO Chair)	-June 29/16 informal conversation with B. Wycks at CISRO LLQP Info Session -April 11/16 informal conversation with B. Wycks, at CISRO LLQP Info Session - Oct. 27/15: R. Fullan gave dedicated CISRO LLQP Stakeholder Info presentation for CAFII members	None at this time	-timing of renewed focus on establishing a Restricted Insurance Agents Advisory Committee  -Sask. RIA regime and licensure issues	
April Stadnek, Director of Licensing	-Sept 22/15 CISRO LLQP Stakeholder Info Session in Toronto (B. Wycks) - Sep 30/14; Fredericton, NB (informal meeting) - November/13 in Toronto when April attended CLHIA CCOSS Seminar	None at this time	-See R. Fullan above	
<b>Financial Consumer Affairs Authority (FCAA):</b> Roger Sobotkiewicz, former Director of FCAA Legal Branch, became Interim Chairperson and Superintendent of Insurance, effective Feb. 1/15	-no previous contact; congratulatory letter on appointment sent March 4/15	-see J. Seibel below	-see J. Seibel below; and -introduce CAFII and build relationship -Regulations being developed following passage of <i>Bill 177, The Insurance Act (Saskatchewan)</i> -ISI: Representation for Restricted Licence Holders - Update on Superintendent's priorities	Pending (see J. Seibel below)

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Ian McIntosh, Deputy Superintendent of Insurance	-Jul 28/14 call with CAFII reps re: "effecting CGI"	-see J. Seibel below	-see J. Seibel below; and  -see R. Sobotkiewicz above	Pending (see J. Seibel below)
Janette Seibel, Lawyer, became lead on Bill 177 and Regulations file effective June 1/15	-Oct. 12/16 telephone call and Oct. 7 and 11/16 e-mail exchanges with B Wycks re FCAA embargo on release of Insurance Regulations Consultation Document -Regular e-mail exchanges on this matter since June 2015 (B. Wycks)	-teleconference meeting in Nov. or Dec. 2016, if necessary	-FCAA's Insurance Regulations Consultation Document (in support of Bill 177, The Insurance Act) and CAFII's response submission: released Oct. 7/16 with a Dec. 2/16 deadline for submissions	Pending
<b>Manitoba</b>				
<b>Ministry of Finance:</b> Ken Lofgren, Acting Superintendent of Insurance  Scott Moore, Deputy Superintendent of Insurance	-Appointed Spring 2015; no previous CAFII contact  -August 10/16 CAFII stakeholder meeting re CCIR travel health insurance Issues Paper (participated by teleconference) -April 15/15 teleconference with three CAFII reps -April 29/14: Winnipeg, MB	None at this time  None at this time	-concern about amended Insurance Act's apparent residency requirement for employees of Restricted Insurance Agents	
Cameron Friesen, Minister of Finance	No contact – took office May 3/16	None	TBD until CAFII has "direct ask" at Ministerial level	

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Erin Pearson, Executive Director, Insurance Council of Manitoba (retiring at end of 2016)	-Sept. 23/16 email exchange with B. Wycks re amendments to Regulation 389/87 which ICM's ISI Committee recommended to Government re incorporating other organizations and other types of insurance into prescribed regulatory framework for RIA licence regime -Oct. 8/15 at CLHIA CCOS Fall Seminar (B. Wycks) -Sept. 30/14: dinner in Fredericton, NB re: ISI implementation	None at this time	-Insurance Council's "ISI items for further review and development"	
<b>Ontario</b>				
<b>FSCO:</b> Brian Mills, appointed Interim CEO and Superintendent on October 18/14	-January 28/15 stakeholder meeting with CCIR	-informal conversation at FSCO Symposium for Life and Health Insurance Sector: November 25/16  -Awaiting clarification of appointment status, emerging from Government action on Expert Panel's final report on FSCO's future mandate (delivered June 20/16)	(i) Introduce CAFII and build/maintain relationship (ii) Ontario government review of FSCO's mandate (iii) next steps, if any, in Life Insurance Product Suitability Review (iv) CCIR review of travel health insurance (v) Update on Superintendent's priorities (vi) communicate CAFII issues	Confirmed        Pending Ontario government action (timing unknown)
Anatol Monid, Interim Executive Director, Licensing and Market Conduct Division	-June 7/16, December 8/15 and June 9/15: informal update conversations with A. Monid at CAFII Reception events  -January 28/15 stakeholder meeting with CCIR	-informal conversation at FSCO Symposium for Life and Health Insurance Sector: November 25/16	-next steps, if any, in Life Insurance Product Suitability Review -other FSCO initiatives re life insurance agent and/or insurer compliance	Confirmed

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Izabel Scovino, appointed Director, Market Conduct Regulation Branch in Nov/14	-Oct. 8/15 at CLHIA CCOS Fall Seminar (B. Wycks) -Nov 21/14 at FSCO Life & Health Insurance Symposium	-informal conversation at FSCO Symposium for Life and Health Insurance Sector: November 25/16	-See A. Monid above	Confirmed
Heather Driver Director, Licensing Branch Licensing and Market Conduct Division (assumed position in Jan 2016, following retirement of Shonna Neil)	-Oct. 14/16 email exchange with B. Wycks following CAFII's delivery of input, requested by FSCO in Oct. 7/16 meeting, re optimal wording to use in FSCO communications re life insurance agent and insurer relationship -Oct. 7/16 meeting with CAFII reps, at FSCO's invitation, re FSCO initiatives around life agent and insurer compliance, particularly re E&O insurance (also attended by Richard Tillman, Allan Amos, Kelly Picard, and Abina Rogers of FSCO)	-informal conversation at FSCO Symposium for Life and Health Insurance Sector: November 25/16	-See A. Monid above	Confirmed
Richard Tillman, Senior Manager, Insurance and Deposit Institutions Policy	-Oct. 7/16 meeting with CAFII reps re life agent and insurer compliance -heads-up call to B. Wycks on May 12/16 re imminent release of CCIR Seg Funds Issues Paper	None at this time. CAFII has chosen not to respond to seg fund issues, as only some members offer them	-CCIR's Segregated Funds Working Group's Issues Paper, open for consultation submissions until July 15/16	



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<b>Ministry of Finance</b>  Three-member Expert Panel advising on Government's review of FSCO's mandate  -David McLean, Policy Advisor	-July 30/15 life & health insurance sector roundtable meeting (P. McCarthy and G. Grant) -May 21/15 informal meeting: insurance sector round table  -June 7/16 and April 12/16 informal conversations with B. Wycks at CAFII Receptions	None at this time	-Awaiting Government announcement of any action in response to Expert Panel's final report (delivered June 20/16), to determine if meeting with Deputy Minister or Assistant Deputy Minister should be pursued  -Discuss Expert Panel's final report to Minister on proposed future mandate of FSCO	Pending Ontario government action (timing unknown)
<b>Quebec</b>				
<b>AMF:</b> Louis Morisset, CEO;         Patrick Dery, Superintendent, Solvency (appointed CCIR Chair effective April 1/15)	-Oct. 4/16 in Montreal: CAFII liaison lunch and Industry Issues Dialogue with AMF  -Apr 8/14: Montreal, QC      -Oct. 4/16 in Montreal: CAFII liaison lunch and Industry Issues Dialogue with AMF  -Liaison lunch and industry issues dialogue on October 6/15 in Levis, Quebec	<b>-AMF 2016 Rendez-Vous one- day conference on financial services regulatory issues on November 14/16 in Montreal (B. Wycks invited to sit at reserved lunch table hosted by AMF executives Louise Gauthier and Maryse Pineault)</b>  -CAFII liaison meeting with AMF in Oct. 2017  -See L. Morisset above	-(i)draft omnibus Bill to modernize Quebec's financial services sector, including Distribution Act (expected release by Ministry of Finance in Q4 2016) -(ii)AMF final paper on electronic commerce in insurance, setting out Orientations/expectations -(iii)Distribution Guide template and implementation timelines -(iv)Update on AMF priorities -(v)Communicate CAFII issues -(vi)Maintain and strengthen relationship   -see L. Morisset above	<b>Confirmed</b>         Tentative/ Pending   Tentative/ Pending

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Eric Stevenson, Superintendent, Client Services and Distribution Oversight	-Oct. 4/16 in Montreal: CAFII liaison lunch and Industry Issues Dialogue with AMF -Liaison lunch and industry issues dialogue on October 6/15 in Levis, Quebec	-See L. Morisset above	-See L. Morisset above	Tentative/ Pending
Louise Gauthier, Senior Director, Distribution Policies and Compensation (member of CCIR TIWG). Lead on AMF's Distribution Guide rewrite initiative.	-Oct. 4/16 in Montreal: CAFII liaison lunch and Industry Issues Dialogue with AMF -August 10/16 CAFII stakeholder meeting re CCIR travel health insurance Issues Paper -Liaison lunch and industry issues dialogue on October 6/15 in Levis, Quebec	-See L. Morisset above	-See L. Morisset above; and  -Distribution Guide rewrite	Tentative/ Pending
<b>Ministry of Finance</b>  Carlos Leitao, Minister  Richard Boivin, Assistant Deputy Minister, Financial Institution Policy and Corporate Law  Guillaume Caudron, Chief of Staff  Yann Nachabé, Policy Advisor	-Feb. 25/16 phone call between B. Wycks and Yann Nachabé, Policy Advisor, Ministry of Finance	-in-person or teleconference meeting with Ministry officials coincident with consultation period on draft omnibus Bill expected in Q4 2016, if necessary  - CAFII request for April 2016 in-person follow-up meeting with Richard Boivin and Guillaume Caudron	-draft omnibus Bill expected to modernize financial sector, incl. the Distribution Act (Minister Leitao in response to question at legislative committee meeting on April 28/16) -Ministry's direction on online distribution of insurance without involvement of an advisor -CAFII submission in response to Report on the Application of the Act respecting the distribution of financial products and service	-Pending release of draft omnibus Bill      -Request politely withdrawn, based on reassuring information from Y. Nachabé

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<b>New Brunswick</b>				
<b>Financial and Consumer Services Commission (Insurance Division):</b> Angela Mazerolle, Superintendent of Insurance	-May 4/16 dinner meeting with Atlantic Canada regulators in Halifax -Oct 1/14: Fredericton, NB	<b>-Q4 2016 or Q1 2017 teleconference meeting or webinar</b>	-refreshed "Seven Point Guide to The Creditor Insurance Regulatory Regime," to be sent by CAFII <b>in Q4 2016</b> as educational resource to counteract false impression that ISI is unregulated -implementation of further phases of online licensing system -legislative/regulatory change to support electronic beneficiary designations -other New Brunswick licensing issues	<b>-Pending</b>
David Weir, Deputy Superintendent of Insurance	-May 4/16 dinner meeting with Atlantic Canada regulators in Halifax - April 11/16 informal discussion with B. Wycks, at CISRO LLQP Info Session - Feb. 19/16 re CAFII feedback on online insurance licensing system - Sept. 22/15 CISRO LLQP Info Session in Toronto (B. Wycks) -Oct 1/14: Fredericton, NB	-see A. Mazerolle above	-see A. Mazerolle above -timing of final recommendations on reforming licensing framework for other-than-life agents and brokers -CAFII feedback on New Brunswick online insurance licensing system	-Pending (see A. Mazerolle above)
<b>Opportunities New Brunswick:</b> Jay Reid, Investment Attraction Officer	-Jun 3/14: Toronto, with Adam Mitton of predecessor organization Invest New Brunswick	None at this time	- CAFII submission re: Insurance Act and regulatory process changes necessary to support business efficiency and further inbound investment and additional jobs in New Brunswick -Introduce CAFII and build relationship -Position CAFII as an information resource	
<b>Consumer Advocate for Insurance:</b> Ronald Godin, Consumer Advocate	No contact	None at this time		

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<b>Nova Scotia</b>				
<b>Superintendent of Insurance:</b> William Ngu, Acting Superintendent of Insurance	-May 4/16 dinner meeting with Atlantic Canada regulators in Halifax -Appointed June 2015; no previous CAFII contact	None at this time	-Review of life and accident & sickness provisions of Insurance Act -legislative/regulatory change to support electronic beneficiary designations -Update on Superintendent's priorities -Communicate CAFII issues; build and strengthen relationship	
Jennifer Calder, Deputy Superintendent of Insurance	-August 10/16 CAFII stakeholder meeting re CCIR travel health insurance Issues Paper (participated by teleconference) -May 4/16 dinner meeting with Atlantic Canada regulators in Halifax	None at this time	-See W. Ngu above	
<b>PEI</b>				
<b>Superintendent of Insurance:</b> Robert Bradley, Superintendent	-Oct 1/14: Fredericton, NB	None at this time	-Review of life and accident & sickness provisions of Insurance Act (on April 23/15, R. Bradley advised that this may get underway in late 2015) -legislative/regulatory change to support electronic beneficiary designations -Update on Superintendent's priorities -Communicate CAFII issues -Maintain and strengthen relationship	
<b>Newfoundland</b>				
<b>Superintendent of Insurance:</b> John O'Neill, Superintendent	-N/A; appointed in October 2015	None at this time	-legislative/regulatory change to support electronic beneficiary designations -Update on Superintendent's priorities -Communicate CAFII issues; build and strengthen relationship	
Craig Whalen, Deputy Superintendent of Insurance	-Oct 1/14: Fredericton, NB	-Same as John O'Neill		



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Harry James, Chair, CCIR Travel Insurance Working Group (TIWG)	-August 10/16 CAFII stakeholder meeting re CCIR travel health insurance Issues Paper  -March 16/16 CAFII/CLHIA joint meeting with CCIR Travel Insurance Working Group -March 24/15 meeting with CAFII EOC re travel health insurance review initiative	<b>-If necessary, Q2 2017 meeting with Harry and TIWG members</b>	<b>-CCIR Travel Health Insurance Products Position Paper and CAFII response to same</b>	<b>Pending CCIR release of Travel Health Insurance Products Position Paper (expected Q2 2017)</b>
Laurie Balfour, Chair, CCIR Insurance Core Principles Implementation Committee (ICPiC)	-August 10/16 CAFII stakeholder meeting re CCIR travel health insurance Issues Paper (participated by teleconference) -May 19/16 CCIR ICPiC webinar presentation for CAFII members (L. Balfour and M. Boyle)	None at this time	-Harmonized Annual Statement on Market Conduct -Framework for Co-operative Market Conduct Supervision in Canada -ICPiC work on IAIS' Insurance Core Principles	
<b>CISRO:</b> Ron Fullan, Chair (SK); G. Matier (BC); J. Abram (AB), W. Martinson (AB); D. Weir (NB)	-August 10/16 CAFII stakeholder meeting re CCIR travel health insurance Issues Paper (participated by teleconference) -June 29/16 informal conversation with B. Wycks at CISRO LLQP Info Session - April 11/16 CISRO LLQP Stakeholder Info Session -March 16/16 CAFII/CLHIA joint stakeholder meeting with CCIR Travel Insurance Working Group	None at this time	-possible CISRO Strategic Plan and opportunity for stakeholders to provide input	

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<b>Financial Consumer Agency of Canada (FCAC):</b> Lucie Tedesco, Commissioner  Brigitte Goulard, Deputy Commissioner  Jane Rooney, Financial Literacy Leader	-May 1/15: B. Wycks made self-introduction and chatted with L. Tedesco, following her speech at CLHIA Conference  -Jun 10/14: B. Goulard was speaker at CAFII event  -Feb 10/15 (presentation at CAFII Annual Luncheon)	None at this time  None at this time	-FCAC consultation on its Proposed Supervision Framework and Publishing Principles for FCAC Decisions (released September 29/16 with November 14/16 deadline for submissions) of document expected)	<b>-CAFII decided not to respond to this consultation, as out-of-scope</b>
Jeremie Ryan, Director, Financial Literacy and Consumer Education  Karen Morgan, Marketing Officer	-Feb. 10/15  -Jan 9/14			