

CAFII Insurance Regulator and Policy-Maker Meetings/Interactions
From February 17, 2024 to March 21, 2024

<u>Date</u>	<u>Event/Occasion/Issue</u>	<u>Who/What</u>
February 27, 2024	Congratulatory note from David Sorensen, Deputy Superintendent of Insurance Regulation and Market Conduct, Government of Alberta	On February 27, 2024 David Sorensen wrote Keith Martin the following email : <i>"Hi Keith, congrats on your appointment as executive director of CAFII.</i> <i>All the best!"</i>
February 27, 2024	Virtual meeting with Mario Beaudoin, AMF	At Mario Beaudoin's request, Keith Martin and Mario Beaudoin had a collaborative virtual touchpoint meeting for 45 minutes. A briefing note is available on the key points raised at the meeting.
March 1, 2024	Invitation from Erica Hiemstra to Keith Martin to have a coffee together to discuss FSRA priorities in 2024	On March 1, 2024 Erica Hiemstra wrote the following email to Keith Martin: <i>Hi Keith,</i> <i>We haven't connected in some time and I thought it would make sense to set up a time to discuss FSRA priorities and industry issues ahead of the upcoming meeting of the L&H SAC with FSRA's Board.</i> <i>Let me know if you want to grab a coffee together one day, here are a few times that might work on my side. Kelly Le can help us firm up the time.</i> <i>March 18 between 3:30 – 5:00 PM</i> <i>March 20 from 9 – 10 AM</i> <i>March 25 from 3 – 5 PM</i> <i>March 26 from 3 – 5 PM</i> <i>I hope you are well and look forward to connecting.</i> <i>Cheers,</i> <i>Erica</i> <i>Erica Hiemstra (she/her)</i> <i>Head, Insurance Conduct, Market Conduct</i> <i>Financial Services Regulatory Authority</i> On March 4, 2024 Keith Martin responded:

		<p><i>Hi Erica, Thanks for reaching out to me, it is great to hear from you. Definitely, I would enjoy getting together. Coffee could work on 25 March at 3pm or later. Just let me know where you would like me to meet you!</i></p> <p><i>--Keith</i></p> <p>On March 5, 2024 Erica Hiemstra, who spoke to Keith Martin at the FSRA Conference on March 4, 2024, responded:</p> <p><i>Hi Keith,</i></p> <p><i>Great to see you yesterday. I've sent an invite for 3:30 on March 25 at Eataly Yorkville. Should be easy for us both to get to. Have a wonderful vacation with your family!</i></p> <p><i>Cheers, Erica</i></p>
March 4, 2024	Meetings with FSRA at the FSRA Exchange Event in downtown Toronto	<p>Keith Martin met with and had personal conversations with the following FSRA regulators at the March 4, 2024 in-person FSRA conference, with Shanay Smith and Robyn Williams also meeting many of these individuals:</p> <p>Erica Hiemstra, Head, Insurance Conduct, Market Conduct;</p> <p>Glen Padassery, Executive Vice President, Policy and Auto/Insurance Products;</p> <p>Huston Loke, Executive Vice President, Market Conduct;</p> <p>Swati Agurwal, Director, Market Conduct, Life & Health Insurance Companies & National Supervision;</p> <p>Stuart Wilkinson, Chief Consumer Officer;</p> <p>Fern Karsh, Regulatory & Policy Lawyer;</p> <p>Joanne De Laurentiis, Board Chair;</p>

		Ali Salahuddin, Board member.
March 5, 2024	Brett Thibault, Director, Governance, and Stakeholder Engagement, Insurance Council of British Columbia, and Janet Sinclair, Chief Executive Officer, Insurance Council of British Columbia	<p>On March 5, 2024 Brett Thibault of the Insurance Council of British Columbia wrote Keith Martin requesting for him and Insurance Council of BC CEO Janet Sutherland to meet over lunch in Toronto:</p> <p><i>Hi Keith, , Janet and I are going to be in Toronto for CISRO meetings and wondering if you would be available to connect for a catch-up while we are in town? Any chance we could meet you for lunch on May 8th?</i></p> <p><i>Please let me know.</i></p> <p><i>Thanks,</i></p> <p>A lunch has been set up close to where the CISRO meetings will be held in Toronto.</p>
Insurance Council of BC	Galen Aker, Stakeholder Engagement Specialist, Insurance Council of BC	<p>On March 14, 2024 Galen Aker wrote the following email to Keith Martin:</p> <p><i>Hello Keith,</i></p> <p><i>Sending along a note to say we have recently published new information on our website with updates about our progress developing the Restricted Insurance Agency Licence (insurancecouncilofbc.com/RIA). The formal regulations are not published yet but we are providing additional details on our work thus far. If you have any questions please let me know.</i></p> <p><i>I'm also following up on a topic we were discussing last year. Our team has been working to develop the remaining details of the Restricted Licensing regime, specifically the skills indicators which provide further details on how businesses will demonstrate their competency that are outlined in the Restricted Insurance Agency Performance Requirements we previously discussed. We would like to reconvene to discuss the skills indicators and hear any feedback you may have.</i></p> <p><i>We are looking to schedule meetings after April 11, if you could please let us know your availability to meet I can send a calendar invitation.</i></p>

		<p><i>Thank you,</i> <i>Galen Aker</i></p> <p>In response Keith Martin accepted the invitation and asked if CAFII volunteer members could join the meeting, and Galen Aker said that was not a problem. The meeting is still in the process of being set up.</p>
Robyn Euverman, Global Affairs Canada	Global Affairs Canada	<p>On March 18, 2024 Patrick Charbonneau from Optimum Reassurance, who Keith Martin knows through THIA, wrote an email to Keith Martin to introduce Global Affairs staffer Robyn Euverman, who covers the departments communications around travel insurance. Ms. Euverman proposed scheduling a get-acquainted virtual meeting, at which she will bring her colleague Victoria Papineau, and a meeting has now been set up for March 27, 2024.</p>