

Agenda Item 2(b)
July 26/22 EOC Meeting

CAFII Insurance Regulator and Policy-Maker Meetings/Interactions
From June 27/22 To July 22/22

<u>Date</u>	<u>Event/Occasion/Issue</u>	<u>Who</u>
June 28/22 to July 22/22	CAFII invitation to Mark White, CEO, Financial Services Regulatory Authority of Ontario (FSRA), to be guest speaker at CAFII's 2022 Annual Members and Associates Luncheon on Tuesday, September 13/22.	On June 28/22, CAFII received a written response confirmation via email from Diba Kohandani, Events Specialist, FSRA, that Mark White, CEO, FSRA, had accepted CAFII's invitation that he be the guest speaker at the Association's 2022 Annual Members and Associates Luncheon on September 13/22. Iterative email communication with FSRA has ensued thereafter, around the logistical details of Mr. White's presentation at the upcoming CAFII event, including FSRA's acceptance of CAFII's supplementary invitation to have several FSRA staff executives accompany Mr. White to the CAFII Luncheon event, at no charge as the Association's guests.
June 29/22	Yukon Government outreach/request for input into its development of an online licensing portal for insurance professionals.	A one-hour CAFII-sponsored Virtual Focus Group with Yukon Government project lead Spring Huston took place on this date, to provide Yukon with design input for its upcoming implementation of an Online Licensing Portal for Insurance Professionals. Six CAFII member representatives and the Association's Co-Executive Directors participated in this meeting with Ms. Huston, which proved to be a very mutually beneficial dialogue and input session. Detailed meeting notes prepared by Sandy Prokop, RBC Insurance, were provided to Ms. Huston after the meeting and gratefully acknowledged.

July 11/11	Email exchange with Peter Burston, Director, National Regulatory Coordination Financial Services Regulatory Authority (FSRA), around efforts to identify an optimal date for CAFII 25 th Anniversary Celebration in Fall 2022	Brendan Wycks had an email exchange with Peter Burston, which provided a clarifying update around plans for in-person CCIR and CISRO meetings to be held in Toronto in October 2022, which should create an ideal scheduling opportunity for a CAFII 25 th Anniversary Celebration on the evening of either Wednesday, October 19 or Thursday, October 20/22 (to be confirmed).
July 13/22	CAFII meeting with three OSFI staff executives to seek clarifications related to its Revised Draft Guideline B-10: Third-Party Risk Management (current consultation document).	Keith Martin and Brendan Wycks met virtually with OSFI staff executives Elspeth Bowler, Managing Director; Josh Lattimore, Senior Advisor; and John Preiato, Director. Ms. Bowler took the lead and delivered the key message that the scope of the proposed updated Guideline on Third-Party Risk Management was quite deliberately intended to be broader than the predecessor B-10 Guideline on Outsourcing, and that wholly-owned subsidiaries were indeed meant to be captured.
July 13/22	CAFII meeting with two AMF staff executives re plans for October 2022 CAFII Board liaison with relevant AMF staff executives	Keith Martin and Brendan Wycks met virtually with AMF staff executives Eric Jacob, Superintendent, Client Services and Distribution Oversight; and Louise Gauthier, Senior Director of Distribution Framework Policies, to discuss and settle on the date (Tuesday, October 11/22); location (to be hosted by Desjardins Insurance at its Montreal office); and format for an informal liaison lunch and immediately ensuing Industry Issues Dialogue (shared agenda approach) between the CAFII Board of Directors and relevant AMF staff executives.

		This meeting was very cordial and successful in terms securing immediate agreement on all of the key details for the upcoming October 11/22 event.
July 19/22	Quarterly meeting of the Saskatchewan Restricted Insurance Agent Advisory Committee (RIAAC), and the first to be organized by new Insurance Councils of Saskatchewan (ICS) Executive Director April Stadnek	Keith Martin represented CAFII management at this meeting, along with CAFII member representative appointees Moira Gill (Chair), Charles MacLean (Vice-Chair), and Shawna Sykes.