

Agenda Item 2(d)
July 18/23 EOC Meeting

CAFII Insurance Regulator and Policy-Maker Meetings/Interactions
From June 24/23 To July 14/23

<u>Date</u>	<u>Event/Occasion/Issue</u>	<u>Who</u>
June 28/23	Email exchange in French with the AMF's Senior Director, Distribution Framework Policies.	On June 28/23, Keith Martin had a productive follow-up email exchange in French with Louise Gauthier, the AMF's Senior Director, Distribution Framework Policies, around the AMF's proposed definition of "Complaints" and its related draft <i>Regulation respecting Complaint Handling and Dispute Resolution</i> , in which Ms. Gauthier committed to give CAFII's expressed views full and serious consideration in the AMF's finalization of the <i>Regulation respecting Complaint Handling and Dispute Resolution</i> .
July 4/23	Regular quarterly one-on-one virtual meeting between CAFII Board Chair and AMF's Superintendent, Client Services and Distribution Oversight.	CAFII Board Chair Peter Thompson held a quarterly virtual liaison meeting with Eric Jacob, the AMF's Superintendent, Client Services and Distribution Oversight: a meeting which planted the seeds for CAFII progress on the issues of, among others, seeking a reconsideration by the AMF of the requirement for CAFII members to have finalized their runoff of spousal CPI coverage by January 1/25; and an opportunity for CAFII to meet and engage in a get acquainted dialogue with Yves Ouellet, the AMF's newly appointed CEO who starts in that role in early August 2023.

July 10/23	BCFSA includes CAFII, as a key industry stakeholder, in Advisory dissemination	On July 10/23, BCFSA distributed to CAFII and other key industry stakeholders an Advisory announcing the release of its anticipated “Insurer Code of Market Conduct,” which included an embedded invitation to a July 20/23 half-hour webinar on “Introducing the BC Insurer Code of Market Conduct”: Webinar Registration - Zoom
July 12-14/23	Email exchange with a senior FSRA staff executive around his guest presenter status for an upcoming CAFII webinar.	Keith Martin sent a reminder outreach email to Stuart Wilkinson, Director of the Consumer Office at the Financial Services Regulatory Authority of Ontario (FSRA), seeking confirmation of his preferred date – September 26 or 27/23 – for a CAFII Fireside Chat Webinar with him, focusing on the mandate and initiatives of the FSRA Consumer Office. This outreach prompted a productive confirmation/settling exchange with Mr. Wilkinson.