

Agenda Item 3€
August 14/18 EOC Teleconference Meeting

From: Lewsen, John [mailto:john.lewsen@bmo.com]
Sent: Thursday, July 12, 2018 5:02 PM
To: Brendan Wycks; Keith Martin
Cc: 'INS Regulatory and Audit Correspondence CAFII'; Thorn, Peter
Subject: RE: CAFII June 5 Networking Reception - Thank You

Agreed – let's discuss as I feel it's important that we can and should be able to continuously cull and refresh our guest lists.

John Lewsen
Head of Insurance Compliance | Legal, Corporate & Compliance Group | BMO Financial Group
Chief Compliance Officer | BMO Life Assurance Company | BMO Life Insurance Company

From: Brendan Wycks [mailto:brendan.wycks@cafii.com]
Sent: July-12-18 1:21 PM
To: Lewsen, John; 'Keith Martin'
Subject: RE: CAFII June 5 Networking Reception - Thank You

Hi, John.

This post-event Thank You email went to those invitees who actually attended the June 5 Reception.

I see your point, though, re a possible downside of announcing the date of the next CAFII Reception in such a Thank You message, even though we did want the Thank You also to serve indirectly as a Save-the-Date for the next Reception.

Perhaps we can have a brief discussion on this matter during the July or August EOC teleconference meeting or at the September in-person EOC meeting, as time allows, to resolve on it for the future.

Brendan Wycks, BA, MBA, CAE
Co-Executive Director
Canadian Association of Financial Institutions in Insurance

From: Lewsen, John [mailto:john.lewsen@bmo.com]
Sent: Thursday, July 12, 2018 1:05 PM
To: Brendan Wycks; Keith Martin
Cc: INS Regulatory and Audit Correspondence CAFII
Subject: FW: CAFII June 5 Networking Reception - Thank You

Hi Brendan and Keith.

Does this placeholder automatically go to all recipients? If so, I am concerned about our ability to cull or change the list for the next reception/s.

Regards

John Lewsen

Head of Insurance Compliance | Legal, Corporate & Compliance Group | BMO Financial Group
Chief Compliance Officer | BMO Life Assurance Company | BMO Life Insurance Company

From: Canadian Association of Financial Institutions in Insurance [mailto:stefanie@cafii.com]

Sent: June-08-18 10:33 AM

To: Lewsen, John

Subject: CAFII June 5 Networking Reception - Thank You

Dear John Lewsen:

Thank you for attending CAFII's Networking Reception on June 5th. We hope you enjoyed the hors d'oeuvres, networking with industry colleagues, and the presentation presented by Neil Parmenter, President and CEO, Canadian Bankers Association (CBA).

CAFII looks forward to welcoming you to our next Networking Reception on Tuesday, November 27, 2018.

Sincerely,

Brendan Wycks, BA, MBA, CAE
Co-Executive Director
Canadian Association of Financial Institutions in Insurance

Keith Martin
Co-Executive Director
Canadian Association of Financial Institutions in Insurance