

Agenda Item 4(a)(ii)
October 23/18 EOC Meeting

Proposal That CAFII Working Group Develop A Template(s)
For Consumer Disclosure Materials To Replace Distribution Guide

From: Keith Martin

Sent: Thursday, October 11, 2018 11:42 AM

To: Gill, Moira; 'Lewsen, John'

Cc: Brendan Wycks; Natalie Hill

Subject: AMF "Summary" Document to Replace Distribution Guide

Hi Moira and John:

Brendan and I have been strategizing about next steps around our response to the AMF consultation paper on the sale of insurance on the Internet.

On the "summary" document that is required to replace the Distribution Guide, we thought that there might be value to CAFII producing a "template" which, potentially, could be used by our members, thereby avoiding each member who sells insurance on the Internet needing to come up with their own version of the document, or at least not having to develop it more or less from scratch (although I should add that there is quite a lot of guidance, some of it quite prescriptive, from the AMF on what needs to be in the "summary" document).

Do you think developing such a template would be of value? If so, we thought that a Working Group could be struck to deal with this issue alone, and given both of your expertise we wanted to reach out to see if you might be available and interested in participating in this exercise.

This will be on the agenda for next Tuesday's one-hour EOC teleconference call, and we wanted to give you advance notice of that so you can give this some consideration before the discussion on this item at the meeting.

--Keith

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