



# CCIR Information Session

Annual Statement on Market Conduct

June 2019

# Agenda

- ▶ Data Quality
- ▶ Changes to the Form
- ▶ Next steps

# Data Quality

# Tips and Reminders



## Be Filing Ready:

- ▶ Update your point of contact information
- ▶ Ensure you can access your E-Services Account
- ▶ Contacts:
  - Your regulatory authority if you are incorporated under provincial legislation.
  - The CCIR at: [ccir-ccrra@fsrao.ca](mailto:ccir-ccrra@fsrao.ca) if you are a federally or foreign chartered insurer.
  - For technical questions on filing, please e-mail the AMF at [infoform.pc-mc@lautorite.qc.ca](mailto:infoform.pc-mc@lautorite.qc.ca).

# Tips and Reminders



## Access to AMF E-Services:

- ▶ Contact us if you forget your password
- ▶ Verify internal security measures, proxy, firewalls, etc.

## Downloading and saving the Annual Statement on Market Conduct (Annual Statement) form:

- ▶ The Excel form is available through your AMF E-Services account in your client file under “Market Conduct”
- ▶ Instructions on how to download, save and submit your ASMC form is available in the [E-Services Guide](#) on [Annual Statement webpage](#)

# Tips and Reminders



## Through E-Services you can:

- ▶ Access and download your OWN Annual Statement Form
- ▶ View and/or download complaints from last year
- ▶ Submit the completed Annual Statement Form
- ▶ View or change your contact information

# Tips and Reminders



## Completing the Annual Statement form:

- ▶ First, save your downloaded Excel file using a distinctive name
- ▶ Complete the Identification tab first
- ▶ Complete each question in the form using proper cell format
- ▶ When copy and pasting data do not copy the cell format
- ▶ Tag all applicable boxes (*i.e. classes of insurance or distribution channels*)
- ▶ Read top page instructions or definitions
- ▶ Fill all mandatory cells
- ▶ Limit completion of the form to one user
- ▶ When possible, give details / explanations in the general comments
- ▶ Do not hesitate to contact us

# Tips and reminders



## Special requirements:

- ▶ Only use your own downloadable form, available thru E-Services
- ▶ You must complete the Annual Statement form in the language of your data software (Excel). You must use this same language for the entire form
- ▶ You must respect the format required by the Annual Statement form
- ▶ The submitted file must not be protected by a password or any other security measure
- ▶ Hyperlinks to external documents are prohibited, but hyperlinks within a document are permitted



# Changes to the ASMC

# Changes for 2019



- ▶ Minor changes to increase clarity
- ▶ Revision of questions for simplification and clarity
- ▶ Added section on Travel Health Insurance

# Walk through Changes for 2019

# Changes for 2020



- ▶ Revise tabs and questions to simplify
- ▶ Revise data requested on:
  - Incentives
  - Internet sales
- ▶ Account for IFRS 17

# Next Steps

# Next Steps

July 12, 2019

- Provide written comments on the Annual Statement

September  
2019

- Year 4 PDF form available (2020 filing of 2019 data)

Fall 2019

- Consultations on changes to the year 5 Annual Statement (2021 filing of 2020 data)

Jan 1, 2020

- Excel form available for download from E-Services

# Contact Information

## ► Contacts:

- Your regulatory authority if you are incorporated under provincial legislation.
- The CCIR at: [ccir-ccrra@fsrao.ca](mailto:ccir-ccrra@fsrao.ca) if you are a federally or foreign chartered insurer.
- For technical questions on filing, please e-mail the AMF at [infoform.pc-mc@lautorite.qc.ca](mailto:infoform.pc-mc@lautorite.qc.ca).