

Agenda

Meeting on Consumer Research Creditors Group Insurance

Part 1--Strategy

1. Welcome – Diane Quigley, Chair, Research & Education
2. Introductions – All
3. Update on Pollara Travel Health Insurance – Sue Manson
4. Discussion of the Strategic Objectives of the research – Diane, Keith
5. Discussion on the Media Strategy
 - a. Media strategy objectives – Charles Blaquiére, Keith Martin
 - b. Sample desired Press Release – David Moorcroft, Media Consultant
6. Review of the Challenges for this Research (e.g. claims)—Lesli Martin, Pollara
7. In Scope, Out of Scope (see Appendix A) – All
8. Other issues – All

Part 2—Developing the Questionnaire

Note—everyone is invited to participate in this session, but only members of the Creditors Insurance Consumer Research Working Group (CICRWK) have to participate

1. Welcome from CICRWK Co-Chairs – Diane Quigley, Craig McKendrick
2. Review of the 2010 materials – Sue Manson
3. Methodological and process issues – Lesli Martin, Pollara
4. Process discussion—how often do we meet? Teleconference or in person? – All
5. Initial discussion on the Questionnaire – All
6. Other issues – All

Appendix A

What Does the Research Cover? What does it Not Cover?

	Mortgage	Line of Credit	Loans	Credit Cards	Other?
Life insurance	Yes? No?	Yes? No?	Yes? No?	Yes? No?	Yes? No?
Job Loss Insurance	Yes? No?	Yes? No?	Yes? No?	Yes? No?	Yes? No?
Disability Insurance	Yes? No?	Yes? No?	Yes? No?	Yes? No?	Yes? No?
Critical Illness	Yes? No?	Yes? No?	Yes? No?	Yes? No?	Yes? No?
Bundled	Yes? No?	Yes? No?	Yes? No?	Yes? No?	Yes? No?
Balance Protection Insurance (Credit Cards)				Yes? No?	Yes? No?

Institutions:

Banks

Insurance companies

Credit unions

Others?

Who/what is not to be covered (e.g. payday loans, car dealerships, warranty products)

Appendix B

Committee Members

Research & Education	Diane Quigley*	Director, Creditor Insurance Product & Pricing	CUMIS	diane.quigley@cumis.com
<i>CAFI Value Proposition</i>	Cecilia Xiao	Director, Lead Counsel for Canada	Assurant	cecilia.xiao@assurant.com
<i>IAIS Core Principles</i>	Scott Kirby	Specialist, Life, Creditor and Travel Government and	TDI	scott.kirby@td.com
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