


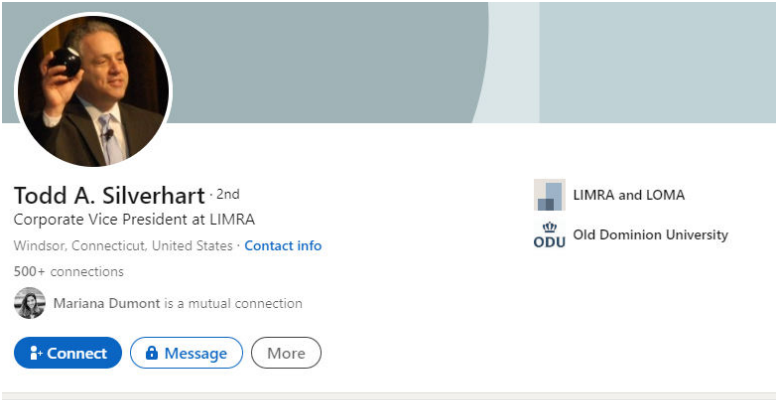




Speaker/Panel	Date	Biography	Comments
Melissa Carruthers Partner at Deloitte's	Reception following Board meeting on Tuesday, April 9 (Assurant, venue TBD)	 <p>Melissa Carruthers is a Partner within Monitor Deloitte's Strategy Consulting practice where she is the National Life and Health Insurance Strategy and Transformation Leader in Canada. Her industry focus spans individual life, health and wealth insurance as well as Group Benefits and Group Retirement Solutions.</p> <p>Melissa joined Deloitte after working a number of years as a Life and Annuities actuary in both the direct insurance as well as reinsurance industries. Her breadth of prior industry experience included roles in pricing and product development as well as corporate actuarial and biometric research. In her current role as a strategy and transformation advisor she works with a number of the leading Canadian Life and Health insurance carriers and financial institutions as they define and execute on various strategic priorities across the organization. She focuses primarily on defining future growth strategies across customers, products and distribution.</p> <p>She is a frequent speaker at industry events on topics such as the future of life and health insurance and the applications of emerging technology within insurance operations. She is a Fellow of the Society of Actuaries and a Fellow of the Canadian Institute of Actuaries.</p>	Excellent speaker Has done work for CAFII in the past Presented in December 2019 at Manulife reception, very well-received
Leslie Martin Senior Vice President at Pollara	Reception following Board Meeting on Tuesday, June 4 (Securian Canada, venue TBD)	 <p>Lesli Martin Senior Vice President</p> <p>A research industry veteran of more than 20 years, Lesli leads many of Pollara's major client accounts as well as many of our research model and product initiatives. Over the years, Lesli has earned a reputation for client service excellence that is second to none – in no small part driven by her experience as a manager of research departments at a number of storied Canadian brands. Our clients benefit from her research expertise, rooted in a career wherein she has designed and analysed hundreds of surveys and</p>	Excellent speaker Knows CAFII well Has done a webinar on general trends in financial services

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		<p>moderated thousands of focus groups for clients in every sector.</p> <p>Although her client portfolio encompasses every sector, she is well known as a research thought leader in the health care, mental health, ad testing, reputation, retail, financial, and municipal and provincial government spaces. She specializes in discovering the belief and motivational systems at the root of each relevant audience, and illuminating the informational messaging that will provoke and inspire these targets, influencers, and stakeholders.</p> <p>Lesli is a Certified Analytics & Insights Professional (CAIP). Prior to joining Pollara, she was a senior researcher and account lead at Leger and comScore, and led research departments at Sears, Cossette, and Great Gulf Homes. She has published numerous research-based articles in peer-reviewed medical journals, and her research has been reported in most Canadian media outlets. Lesli holds a BA in Business Communication from Brock University.</p>	
Senior researcher at LIMRA/LOMA	Reception following Board meeting on Tuesday, December 3 (Chubb, downtown offices of Chubb)	<p>LIMRA Hires Two Industry Executives to Join Research Leadership Team</p> <p>4/14/2022</p>  <p>Bryan Hodgens</p>  <p>Keith Golembiewski</p> <p>WINDSOR, Conn., April 14, 2022—LIMRA today announced it hired Bryan Hodgens and Keith Golembiewski to lead its Distribution and Retirement Income Research programs and Strategic Initiatives, respectively. They will report to Alison Salka, Ph.D., senior vice president and director of LIMRA Member</p>	<p>LIMRA has researchers specializing in life and health insurance and general trends</p> <p>Would require modest travel / hotel costs to be defrayed (have a budget for this)</p>

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		<p>Benefits and Research.</p> <p>"We are pleased to have Bryan and Keith join our research leadership team," said Salka. "Their experience and expertise in financial services will help expand the breadth and relevancy of our research agenda for our members. They are valuable additions to LIMRA."</p> <p>In his new role, Hodgens will be responsible for developing and executing the research strategy for both the distribution and retirement income research programs. Under his leadership, LIMRA's distribution and retirement income research divisions will continue to conduct a broad variety of critical research, focused on providing insight and best practices to address the emerging business challenges facing LIMRA members.</p> <p>Hodgens has served in executive positions for leading financial services companies over the past 20 years, including AIG, Wells Fargo Advisors and Asset Growth Partners. Most recently, he was senior vice president and head of LPL Financials' Retirement Plans and Financial Planning Group. In this role, he established and led the internal and external sales teams, driving double-digit growth during his tenure.</p>  <p>About</p> <p>Silverhart is responsible for directing select strategic research initiatives as well as implementing and managing processes to assure the quality of LIMRA's research program. In this recently created role, he oversees the development of research agendas, the practices followed in conducting research, and the procedures for assuring the quality of research deliverables.</p> <p>A frequent industry speaker and author, he also serves as staff representative for LIMRA's Customer Insight Advisory Council.</p>  <p>https://www.limra.com/en/about/governance/executive-profiles/</p>	

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Perrin Beatty President and CEO, Canadian Chamber of Commerce	Annual Members and Associates Luncheon Tuesday, May 28 St. James Cathedral, Toronto	 <p>The Honourable Perrin Beatty, PC, OC, is the President and Chief Executive Officer of the 200,000-member Canadian Chamber of Commerce, Canada's largest and most representative national business association. Before joining the Canadian Chamber in August 2007, Perrin held the same role at Canadian Manufacturers & Exporters (CME). A descendant of one of Canada's most prominent manufacturing families, he grew up in Fergus, Ontario and graduated from the University of Western Ontario in 1971. Perrin was first elected to the House of Commons as a Progressive Conservative in 1972. During his 21 years in Parliament, he served as Minister in seven different portfolios, including Treasury Board, National Revenue, Solicitor General, Defence, National Health and Welfare, Communications and External Affairs. In 1994, Perrin joined a number of private sector boards and worked as a consultant in communications. In addition, he was an Honorary Visiting Professor in Western University's Department of Political Science. From 1995 to 1999, he served as President and Chief Executive Officer of the Canadian Broadcasting Corporation. In keeping with his long-standing interest in education, Perrin served as Chancellor of the University of Ontario Institute of Technology from 2008 to 2015. He has received honorary Doctor of Law degrees from Western University, the University of Ontario Institute of Technology and Wilfrid Laurier University. Perrin is currently a member of the board of directors of Mitsui Canada and in 2018, he was made an Officer of the Order of Canada for his lifetime of public service and for his devotion to the development of our nation as a community leader and corporate visionary. In 2020, the Government of Japan awarded Perrin the Order of the Rising Sun, Gold and Silver Star, in recognition of his many distinguished achievements in international relations and advancements in Canada-Japan business relations</p>	Well-known speaker with great familiarity of the regulatory environment in Canada

Other possible speakers



Sonia Baxendale
President and Chief Executive Officer, Global Risk Institute

Sonia Baxendale is a highly respected executive who has more than 20 years' experience in senior leadership roles in the financial services industry. Ms. Baxendale serves on the Board of Directors for a number of Canadian and international corporate and not-for-profit organizations. As the President and CEO of GRI, Ms. Baxendale leads the premier risk management organization for the financial services industry globally.

[Read more](#)

In this role, Ms. Baxendale brings together leaders from industry, academia and government to focus on emerging risk management issues. The global pandemic has brought to the forefront a confluence of domestic and global concerns – geopolitical tensions, climate change, systemic racism, social and economic disparities. Under Ms. Baxendale's leadership, GRI has stepped up to develop strategic research and education. She has brought together experts from across the country and the globe to focus on long-term, sustainable solutions for Canada's economic recovery.

In addition to her role with GRI, Ms. Baxendale is a Director on the Board of Laurentian Bank, Foresters Financial, and The Bank of N.T. Butterfield & Son Limited. She is Chair of the Board of SickKids Foundation and a member of the Board of Trustees for the Hospital for Sick Children.

Prior to joining GRI, Ms. Baxendale was President of CIBC Retail Markets where she led Retail and Wealth Management businesses. Ms. Baxendale played a key role in developing strategy and direction for CIBC and held various leadership roles including Senior Executive Vice-President, CIBC Wealth Management, Executive Vice-President, Asset Management, Card Products and Collections, and Executive Vice-President of Global Private Banking and Investment Management Services. Prior to CIBC, Ms. Baxendale held various positions with American Express Canada and Saatchi & Saatchi.

Ms. Baxendale is a graduate of the University of Toronto, where she was named University of Toronto, Victoria College Alumni of Distinction in 2017. She was named one of the "Top 100 Most Powerful Women in Canada" for three years in a row and then joined the ranks of the Top 100 Hall of Fame in 2010. In 2000, she was recognized as one of Canada's Top 40 Under 40.



Giles Gherson
President and Chief Executive Officer

Giles Gherson is the President and Chief Executive Officer of the Toronto Region Board of Trade, one of the largest and most influential business organizations in North America. Giles leads the Board's efforts to advocate on behalf of our members and enhance the business competitiveness of our Region. He is charged with leading the implementation of the Board's new strategic plan to renew our mission as a catalyst for a vibrant, globally competitive Toronto Region business community.

Prior to joining the Board in 2022, Giles spent over 25 years in the private and public sector in progressively senior roles. He spent 15 years with the Province of Ontario, where he held multiple influential Deputy Minister roles – most extensively and recently as Deputy Minister, Economic Development. Previously, Giles has led the government's economic growth and competitiveness policy, overseen the recent creation of two new agencies, Invest Ontario and IP Ontario, and worked to attract a wave of technology and manufacturing investments, including the retooling of the province's auto sector for next generation battery electric vehicles. He currently sits on Ontario's Advanced Manufacturing Council, working to boost the long-term competitiveness and resilience of this sector by attracting key investments and creating opportunities for businesses across the province.

Prior to his role in government, Giles worked as editor-in-chief of the Toronto Star, political editor of the National Post and editor of the Globe and Mail's Report on Business. Giles is the immediate past President of the Board of Directors at the Institute of Public Administration of Canada, the country's leading professional organization supporting excellence in the public sector.


CAFII Members and Associates Luncheon
Possible future speakers

2025: Yves Ouellet, President and CEO, AMF

2026: Lawyers panel

2027: Mark White, President and CEO, FSRA

Webinar Possible Panelists 2024

<u>Date</u>	<u>Speaker/Panel</u>	<u>Comments</u>
February 1	Amber Mac, on technology, AI	Spoke to THIA and was very well-received
MID FEBRUARY	Justeena Zaki-Azat, LIMRA	Lead researcher on CAFII LIMRA study If this is released, this would be part of the public release of the research Regulators and Policy-Makers would be invited
March 27/28	Supriya Syal, Deputy Commissioner, Research, Policy and Education Financial Consumer Agency of Canada 	Keeping a connection with FCAC, good speaker, interesting observations
April 14/15	Mental Health Issues in the Workplace	Paula Allen, Telus Health Two panelists from CAFII members who have not participated in the past (Have participated: Sun Life, Manulife, Securian Canada)
Sept. 11/12	Two new Atlantic Canada regulators: David McCarron (Nova Scotia) and Jean Bishop (Newfoundland and Labrador)	Panel
October 8/9	Éric Jacob, new Head of Enforcement, on his priorities	Knows CAFII well
November 13/14	Travel and Travel Insurance Trends in the Workplace Katia Umutoniwase, Manulife and CAFII Sheila Burns, CLHIA Someone from THIA	Very popular webinar every year