

Agenda Item 4(d)(i)
July 26/22 EOC Meeting

From: Brendan Wycks <brendan.wycks@cafii.com>
Sent: Wednesday, June 22, 2022 4:45 PM
To: Mark White <Mark.White@fsrao.ca>
Cc: Keith Martin <Keith.Martin@cafii.com>; Huston Loke <Huston.Loke@fsrao.ca>; Alicia Leshkiw <Alicia.Leshkiw@fsrao.ca>; Diba Kohandani <Diba.Kohandani@fsrao.ca>; Rachel Olaso-Pezeshkian <Rachel.Olaso-Pezeshkian@fsrao.ca>; Jake Becker <jake.becker@cafii.com>; Meighan Pears <events@cafii.com>; Danielle McLean <Danielle.McLean@cafii.com>
Subject: CAFII 2022 Annual Members and Associates Luncheon Guest Speaker Invitation Letter To Mark White, CEO, Financial Services Regulatory Authority of Ontario
June 22, 2022

Mr. Mark White, CEO
Financial Services Regulatory Authority of Ontario
25 Sheppard Avenue West, Suite 100
Toronto, Ontario
M2N 6S6
mark.white@fsrao.ca

Dear Mark:

Re: Invitation To Be Guest Speaker At CAFII's 2022 Annual Members and Associates Luncheon

Thank you for inviting us to attend the June 9/22 FSRA Reception in honour of founding FSRA Board Chair Bryan Davies; other founding FSRA Board members; and the third anniversary of FSRA's June 2019 launch as Ontario's new financial services regulator. We very much enjoyed the welcome to FSRA's new office facilities and the event itself; and we appreciated the opportunity to echo the tributes to Bryan Davies, Kathryn Bouey, Judith Robertson, and Richard Nesbitt, by chatting with them and with many of the current FSRA Board members and staff who were present.

And in follow-up to a matter which Brendan Wycks discussed with you at the June 9 Reception, another important purpose of this letter is to extend an official, written invitation to you to be the guest speaker at our 2022 CAFII Annual Members and Associates Luncheon. Here are the key particulars about that event:

Date: Tuesday, September 13, 2022.

Time: 11:30 a.m. to 2:15 p.m.

Location: St. James Cathedral Centre Event Venue, 65 Church St., Toronto, Ontario M5C 2E9

Audience: Between 100 and 150 CAFII Member and Associate representatives. (See **Appendix A** for more Audience Profile details.)

Format: CAFII would be comfortable with either of the following approaches, whichever you prefer:

- (a) a regular speech/TED Talk-style presentation of 35 to 40 minutes duration, followed by a Q&A session of interactive dialogue with the audience for 10 to 15 minutes; or
- (b) a “fireside chat” approach in which a CAFII moderator (likely Co-Executive Director Keith Martin) would dialogue with you and guide/facilitate discussion of a number of pre-approved questions on the chosen topic over the course of 35 to 40 minutes, followed by an open Q&A session of interactive dialogue with the audience for 10 to 15 minutes.

*(See **Appendix A** for the Tentative Order of Proceedings for CAFII’s 2022 Annual Members and Associates Luncheon.)*

Title/Topic of Presentation: Any topic of your choosing which will give rise to an information-sharing and update presentation on FSRA’s current and future priorities and your vision for the Authority would be very audience-relevant and meet CAFII’s expectations. (However, we do wish to receive from you a catchy/grabber title for the presentation, which will aid in our promotional efforts around the event.)

In particular, the following themes/sub-topics would be germane and appealing to the CAFII Members and Associates audience; and could potentially be knitted together into a FSRA overview presentation:

- how FSRA is making principles-based regulation (PBR) work and how it fits with rule-making authority and enforcement powers;
- how FSRA is making consumer views/input a “by-design” element of its priorities;
- how FSRA strives to find the right balance between Fair Treatment of Customers and fostering industry innovation (Innovation Office and other mechanisms);
- the role FSRA sees for itself in harmonization initiatives, at the CCIR and CISRO national co-ordinating body tables;
- how FSRA plans to play a role on the international stage – through its membership involvement in the International Association of Insurance Supervisors (IAIS) – and how IAIS insights will be brought home to inform regulatory initiatives in Ontario and Canada (through CCIR and CISRO);
- how FSRA is deploying technology (reg-tech) to enhance its consumer protection initiatives;
- how FSRA has designed its return-to-office around a hybrid work model; and how it has configured its new office space to be collaborative and team-building; and
- how FSRA plans to maintain and continue to “walk the talk” on its commitment to fulsome, meaningful consultation with industry stakeholders.

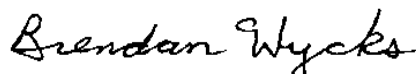
Finally, we would ask that you try to focus your remarks primarily upon the life and health insurance sector; and, to the degree possible, deliver some insights or messages that are tailored for the credit protection insurance and/or travel insurance subsector(s).

Everyone associated with CAFII is excited by the prospect of having you be our 2022 speaker, Mark, and is hoping that you will be able to accept to this invitation. We ask that you respond at your earliest convenience.

Sincerely,



Keith Martin, Co-Executive Director, CAFII
647.460.7725



Brendan Wycks, Co-Executive Director, CAFII
647.218.8243

C.C.

Alicia Leshkiw, Executive Assistant to the CEO, FSRA
Huston Loke, Executive Vice-President, Market Conduct, FSRA
Diba Kohandani, Engagement and Events Co-ordinator, FSRA

From: Diba Kohandani <Diba.Kohandani@fsrao.ca>

Sent: June-28-22 3:51 PM

To: Brendan Wycks <brendan.wycks@cafii.com>

Cc: Keith Martin <Keith.Martin@cafii.com>; Alicia Leshkiw <Alicia.Leshkiw@fsrao.ca>; Jake Becker <jake.becker@cafii.com>; Meighan Pears <events@cafii.com>; Danielle McLean <Danielle.McLean@cafii.com>; Dan Miles <Dan.Miles@fsrao.ca>

Subject: RE: CAFII 2022 Annual Members and Associates Luncheon Guest Speaker Invitation Letter To Mark White, CEO, Financial Services Regulatory Authority of Ontario

Hello Brendan,

I hope this email finds you well.

I wanted to send a quick note of thanks for the invitation below that was shared with Mark.

I am happy to confirm Mark for September 13th at 11:30 a.m.

I look forward to hearing from Meighan on next steps.

Thank you,

Diba Kohandani

Engagement & Events Coordinator

Public Affairs

Financial Services Regulatory Authority (FSRA)

C: 416.904.4667

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From: Brendan Wycks <brendan.wycks@cafii.com>
Sent: Tuesday, June 28, 2022 3:55 PM
To: Diba Kohandani <Diba.Kohandani@fsrao.ca>
Cc: Keith Martin <Keith.Martin@cafii.com>; Alicia Leshkiw <Alicia.Leshkiw@fsrao.ca>; Jake Becker <jake.becker@cafii.com>; Meighan Pears <events@cafii.com>; Danielle McLean <Danielle.McLean@cafii.com>; Dan Miles <Dan.Miles@fsrao.ca>
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Thanks very much, Diba, for that excellent news which CAFII is delighted to receive.

Danielle McLean or Meighan Pears from our CAFII events team will be back in touch with you in the very near future re next steps.

Brendan Wycks, BA, MBA, CAE

Co-Executive Director
Canadian Association of Financial Institutions in Insurance
Brendan.wycks@cafii.com

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From: Meighan Pears <events@cafii.com>
Sent: Thursday, June 30, 2022 9:27 AM
To: Diba Kohandani <Diba.Kohandani@fsrao.ca>
Cc: Keith Martin <Keith.Martin@cafii.com>; Alicia Leshkiw <Alicia.Leshkiw@fsrao.ca>; Jake Becker <jake.becker@cafii.com>; Danielle McLean <Danielle.McLean@cafii.com>; Dan Miles <Dan.Miles@fsrao.ca>; Brendan Wycks <brendan.wycks@cafii.com>
Subject: RE: CAFII 2022 Annual Members and Associates Luncheon Guest Speaker Invitation Letter To Mark White, CEO, Financial Services Regulatory Authority of Ontario

Good morning Diba,

CAFII is thrilled to have Mark speak at our Annual Members and Associates Luncheon!

With that being said, we would like to invite Mark to invite up to 8 FSRA executives to join the luncheon as our special guests. We have engaged with many FSRA executives in the past—like Huston Loke, Glen Padassery, Erica Hiemstra, Swati Agrawal, and Marlena Labieniec, among others—and we would be delighted to have such individuals join Mark at the luncheon.

Please let me know the names and emails of any executives Mark would like to attend and I will make sure they receive the invitation.

Thank you and have a great long weekend!

Sincerely,

Meighan Pears

Event Planner

Canadian Association of Financial Institutions in Insurance

From: Diba Kohandani <Diba.Kohandani@fsrao.ca>

Sent: July-13-22 10:53 AM

To: Meighan Pears <events@cafii.com>

Cc: Keith Martin <Keith.Martin@cafii.com>; Brendan Wycks <brendan.wycks@cafii.com>

Subject: RE: CAFII 2022 Annual Members and Associates Luncheon Guest Speaker Invitation Letter To Mark White, CEO, Financial Services Regulatory Authority of Ontario

Hi Meighan, Brendan and Keith,

Hope all is well.

I wanted to let you know that I have received the following names as executives who will attend with Mark.

1. Dan Miles – dan.miles@fsrao.ca
2. Jordan Solway – Jordan.solway@fsrao.ca
3. Stephen Power – Stephen.power@fsrao.ca
4. Erica Hiemstra – Erica.hiemstra@fsrao.ca
5. Swati Agrawal – swati.agrawal@fsrao.ca
6. Mehrdad Rastan – Mehrdad.rastan@fsrao.ca

I also wanted to share the news that I have resigned from my role at FSRA and my last day is today. You can continue to send emails to this account as they will be forwarded to a colleague in the interim.

It has been a pleasure working with you all over the years and I wish you the best.

Thank you,

Diba Kohandani

Engagement & Events Coordinator

Public Affairs

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