

Agenda Item 5(e)
April 25/23 EOC Meeting

Firmed-Up CAFII Liaison Meetings With Insurance Regulators During 2023 CLHIA Compliance and Consumer Complaints Conference in Montreal, May 3-5/23

From: Brendan Wycks <brendan.wycks@cafii.com>
Sent: April 19, 2023 2:06 PM
To: Joanne Abram <jabram@abccouncil.ab.ca>
Cc: Keith Martin <Keith.Martin@cafii.com>; Jake Becker <jake.becker@cafii.com>; Brent Rathgeber KC <brathgeber@abccouncil.ab.ca>
Subject: [External] Request For Alberta Insurance Council/CAFII Liaison Meeting On The Sidelines Of Upcoming 2023 CLHIA Compliance and Consumer Complaints Conference In Montreal

Hello, Joanne.

As you know, mutually beneficial relationship-building, communications, and dialogue with insurance regulators and policy-makers from across the country form a key part of CAFII's mission and mandate.

And with the restrictions on in-person meetings caused by the COVID-19 pandemic now largely behind us in 2023, we are pleased to be able to return to arranging in-person meetings with key insurance regulators and policy-makers, such as yourself, after a nearly four-year hiatus.

In that connection, we're reaching out at this time in the hopes of arranging a liaison meeting with you and any Alberta Insurance Council staff colleague(s) who will be present with you in Montreal in the first week of May, in connection with the 2023 CLHIA Compliance and Consumer Complaints Conference happening there. The purpose of the requested meeting is to have some information-sharing and dialogue, around Alberta/provincial, national, and international insurance regulatory and licensure issues of mutual interest; and to share the results of recent CAFII initiatives that are of relevance to the Alberta Insurance Council.

Here are some possible date/time options, all associated with the 2023 CLHIA Compliance and Consumer Complaints Conference which we will be attending and at which you are a panel presenter on Friday morning, May 5/23:

- pre-dinner snacks and beverages on Thursday, May 4/23 from 4:50 to 5:50 p.m. at the Omni Mont Royal Hotel (the conference hotel), if you will have arrived at the conference hotel by that time;
- a breakfast meeting from 7:15 to 8:15 a.m. on Friday, May 5/23 at the Omni Mont Royal Hotel; or
- a lunch meeting beginning at around 12:30 p.m. on Friday, May 5/23 at the Omni Mont Royal Hotel or a nearby restaurant, if you will be staying on in Montreal after the conference has concluded.

Please consider these options for a meeting and let us know if any of them will work for you, Joanne.

We look forward to hearing back from you at your earliest convenience, and to confirming a meeting with you during the upcoming CLHIA Conference in Montreal.

P.S. our Association will also be resuming its *Insurance Regulators and Policy-Makers Visits Tours* this year, with the intention of visiting the four Western Canada provinces this spring – in late May and very early June – in two blocks of two provinces at a time, in two successive weeks. In that connection, we will be reaching out to you again, Joanne, on that separate matter very soon (likely tomorrow) to ask, in the first instance, for your view as to whether it makes sense for CAFII to visit Alberta in the Wednesday, May 24/23 through Friday, May 26/23 time period, given that there is a provincial election scheduled to occur on or shortly before Monday, May 29/23? (Would being in the election writ period prevent you and your AIC staff executive colleagues from meeting with us at that time?)

Or would it be better for us to plan to visit Alberta (AIC and Alberta Treasury Board and Finance) the next week – during the Wednesday, May 31/23 through Friday, June 2/23 timeframe, along with one other province – given that, at that stage, the provincial election will already have taken place, the previous week?

Best regards,

Brendan Wycks, BA, MBA, CAE

Co-Executive Director

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From: Joanne Abram <jabram@abcouncil.ab.ca>

Sent: Wednesday, April 19, 2023 5:01 PM

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

Cc: Keith Martin <Keith.Martin@cafii.com>; Jake Becker <jake.becker@cafii.com>; Brent Rathgeber KC <brathgeber@abcouncil.ab.ca>; Joseph Fernandez <jfernandez@abcouncil.ab.ca>

Subject: RE: [External] Request For Alberta Insurance Council/CAFII Liaison Meeting On The Sidelines Of Upcoming 2023 CLHIA Compliance and Consumer Complaints Conference In Montreal

Hi, Brendan.

I would love to meet with you and touch base on the issues and opportunities that we both anticipate and to enhance the communication between our organizations.

Joseph Fernandez, Director of Compliance for the AIC will be accompanying me and I look forward to the opportunity to introduce you to him at our meeting.

Pre-dinner snacks and beverages on Thursday May 4th at 4:50PM at the conference hotel would fit best into my schedule. If that still works for you please send me a meeting invite.

I look forward to seeing you then.



Joanne Abram
Chief Executive Officer
Alberta Insurance Council

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From: Brendan Wycks

Sent: Wednesday, April 19, 2023 3:42 PM

To: khopkins@insurancecouncilofbc.com

Cc: Janet Sinclair <jsinclair@insurancecouncilofbc.com>; Galen Aker <gaker@insurancecouncilofbc.com>; Brett Thibault <bthibault@insurancecouncilofbc.com>; Keith Martin <Keith.Martin@cafii.com>; Jake Becker <jake.becker@cafii.com>

Subject: Request For Insurance Council of BC/CAFII Liaison Meeting On The Sidelines Of Upcoming 2023 CLHIA Compliance and Consumer Complaints Conference In Montreal

Hello, Kandace.

As you know, mutually beneficial relationship-building, communications, and dialogue with insurance regulators and policy-makers from across the country form a key part of CAFII's mission and mandate.

And with the restrictions on in-person meetings caused by the COVID-19 pandemic now largely behind us in 2023, we are pleased to be able to return to arranging in-person meetings with key insurance regulators and policy-makers, such as yourself, after a nearly four-year hiatus.

In that connection, we're reaching out at this time in the hopes of arranging a liaison meeting with you and any Insurance Council of BC staff colleague(s) who will be present with you in Montreal in the first week of May, in connection with the 2023 CLHIA Compliance and Consumer Complaints Conference happening there, to have some information-sharing and dialogue: mainly around the Insurance Council of BC's in-development Restricted Insurance Agency (RIA) licensing regime; other BC/provincial, national, and international insurance regulatory and licensure issues of mutual interest; and to share the results of recent CAFII initiatives that are of relevance to the Insurance Council of BC.

Here are some possible date/time options, all associated with the 2023 CLHIA Compliance and Consumer Complaints Conference which we will be attending and at which you are a panel presenter on Friday morning, May 5/23:

- pre-dinner snacks and beverages on Thursday, May 4/23 from 4:50 to 5:50 p.m. at the Omni Mont Royal Hotel (the conference hotel), if you will have arrived at the conference hotel by that time;
- a breakfast meeting from 7:15 to 8:15 a.m. on Friday, May 5/23 at the Omni Mont Royal Hotel; or
- a lunch meeting beginning at around 12:30 p.m. on Friday, May 5/23 at the Omni Mont Royal Hotel or a nearby restaurant, if you will be staying on in Montreal after the conference has concluded.

Please consider these options for a meeting and let us know if any of them will work for you, Kandace.

We look forward to hearing back from you at your earliest convenience, and to confirming a meeting with you during the upcoming CLHIA Conference in Montreal.

Brendan Wycks, BA, MBA, CAE

Co-Executive Director

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From: Brendan Wycks
Sent: Wednesday, April 19, 2023 3:19 PM
To: 'angela.mazerolle@fcnb.ca' <angela.mazerolle@fcnb.ca>
Cc: 'Weir, David (FCNB)' <david.weir@fcnb.ca>; Keith Martin <Keith.Martin@cafii.com>; Jake Becker <jake.becker@cafii.com>; Picard, Robert (FCNB) <Robert.Picard@fcnb.ca>; Haines, Catherine (FCNB) <Catherine.Haines@fcnb.ca>; Sutherland Green, Jennifer (FCNB) <jennifer.SutherlandGreen@fcnb.ca>
Subject: Request For FCNB/CAFII Liaison Meeting On The Sidelines Of Upcoming 2023 CLHIA Compliance and Consumer Complaints Conference In Montreal

Hi, Angela.

As you know, mutually beneficial relationship-building, communications, and dialogue with insurance regulators and policy-makers from across the country are a key part of CAFII's mission and mandate.

And with the restrictions on in-person meetings caused by the COVID-19 pandemic now largely behind us in 2023, we are pleased to be able to return to arranging in-person meetings with key insurance regulators and policy-makers, such as yourself, after a nearly four-year hiatus.

In that connection, we're reaching out at this time in the hopes of arranging a liaison meeting with you and any FCNB Insurance Division staff colleague(s) who will be present with you in Montreal in the first week of May, in connection with the 2023 CLHIA Compliance and Consumer Complaints Conference happening there, to have some information-sharing and dialogue: mainly around FCNB's implementation of Rule INS-001, the related launch of the province's new Restricted Insurance Representative (RIR) licensing regime, and CAFII member company adaptation and compliance; other New Brunswick/provincial, national, and international insurance regulatory and licensure issues of mutual interest; and to share the results of recent CAFII initiatives that are of relevance to the FCNB.

Here are some possible date/time options, all associated with the 2023 CLHIA Compliance and Consumer Complaints Conference which we will be attending and at which you are a panel presenter on Wednesday morning, May 3/23:

- a dinner meeting at around 8:00 p.m. on Tuesday, May 2/23 at the Omni Mont Royal Hotel (the conference hotel) or a nearby restaurant, if you will have arrived at the conference hotel by that evening;
- a breakfast meeting from 7:15 to 8:30 a.m. on Wednesday, May 3/23 at the Omni Mont Royal Hotel (the conference hotel);
- a lunch meeting from 12:05 to 12:55 p.m. on Wednesday, May 3/23 at the Omni Mont Royal Hotel (the conference hotel); or
- a dinner meeting at 7:30 p.m. on Wednesday, May 3/23 at the Omni Mont Royal Hotel (the conference hotel) or a nearby restaurant, if you will be staying on in Montreal through to that evening.

Please consider these options for a meeting and let us know if any of them will work for you, Angela.

We look forward to hearing back from you at your earliest convenience, and to confirming a meeting with you during the upcoming CLHIA Conference in Montreal.

Brendan Wycks, BA, MBA, CAE

Co-Executive Director

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