

Agenda Item 6(e)
January 26/21 EOC Meeting

A customized version of the following “Special Invitation To Join As A ‘CAFII Associate’” was sent to the following prospects in mid-December, 2020:

New Associate Prospects (11)

Stikeman Elliott
Norton Rose Fulbright
Fasken
Deloitte Canada
RSA
Dog and Pony Studios
Allianz Global Assistance
Tugo
World Travel Protection Canada
AIG Canada
Optimum Reassurance

Lapsed Associate Prospects (11)

Munich Re
DGA Careers
Swiss Re
Operatic Agency (formerly RankHigher)
PwC
AXA Assistance Canada
CSI Brokers Inc.
Oliver Wyman
Eckler
The Benefits Alliance Group
DIRECTimi

From: Brendan Wycks

Sent: December-15-20 5:16 PM

To: sean.mcgurran@rsagroup.ca; sthom@johnson.ca; travis.macgiver@rsagroup.ca

Cc: Keith Martin <Keith.Martin@cafii.com>; Albert Lin <albert.lin@cafii.com>; Tara Moran <Tara.Moran@cafii.com>

Subject: Special Invitation To Join As A "CAFII Associate" In 2021: Significantly Enhanced Suite of Industry Intelligence/Insights and Networking/Business Development Benefits for Modest \$4,800 Annual Dues

Hello, Sean, Shane, and Travis.

As senior executives at a company/firm that is a key supplier of professional services to the Canadian Association of Financial Institutions in Insurance and/or our 13 CAFII Member companies -- which collectively comprise the vast majority of the credit protection insurance/bancassurance sector and a significant component of the travel health insurance sector in Canada – you may be aware that our Association has a Member-like category of affiliate/supporter called “CAFII Associate.”

Given your company’s status as an important supplier to and supporter of the credit protection insurance/travel insurance/bancassurance sector in Canada and your existing relationship with CAFII, the purpose of this outreach email is to invite RSA Canada to join CAFII as an Associate in 2021.

For modest annual dues of \$4,800, CAFII Associates gain access to a recently significantly enhanced range of benefits which focus on (i) industry intelligence and actionable insights; and (ii) networking and business development opportunities through exposure to and engagement with senior representatives from CAFII Members.

CAFII Associates now receive the following direct access benefits:

CAFII Alerts Weekly Digest

Insider information and industry intelligence delivered once a week

The CAFII Alerts Weekly Digest is a new insider information/industry intelligence benefit which was introduced for both Members and Associates in 2020. The Weekly Digest is a compilation of domestic and international news items relevant to the Canadian credit protection insurance/travel insurance/bancassurance sector. Each issue of the Digest features synopses of a wide range of CAFII sector-relevant articles; links to the full articles at the source publications; a thought-provoking Research/Technology/Thought Leadership appendix; and a helpful Table of Contents with embedded links to the synopsis articles in that week’s issue. Each week, the Digest is distributed directly to the designated contact at each Associate company, for distribution within the organization as the contact sees fit. We are pleased to attach three recent issues of the CAFII Alerts Weekly Digest, as samples of this information/intelligence/insights compilation which you can expect to receive each week as a CAFII Associate.

CAFII Monthly Regulatory Updates

The Regulatory Update is a deeper dive and more precisely focused intelligence piece, filled with insights about industry and regulatory developments

Produced monthly by the Association's Co-Executive Directors (except in July, August, and December) -- primarily for the CAFII Board of Directors and the Association's Executive Operations Committee, but with expanded distribution to CAFII Associates since early 2020 -- the Regulatory Update features information and insights about Canadian and international insurance policy-maker and regulator developments which are relevant to the credit protection insurance/travel insurance/bancassurance sector. We are pleased to attach three editions of the Regulatory Update that were produced in 2020, as samples of this insurance policy and regulation-focused intelligence and insights compendium which you can expect to receive nine months of the year as a CAFII Associate.

Annual Members and Associates Luncheon: Superb Profile-Raising, Networking and Business Development Opportunity

Annual in-person luncheon event with a leading industry guest speaker or panel of presenters

The CAFII Annual Members and Associates Luncheon is a major networking/relationship-building, business development, and education opportunity for CAFII Associates. Up to five of your company's representatives can attend the Annual Members and Associates Luncheon, at no charge (additional attendees beyond five may attend at a fee of CAFII's marginal-cost-only). The Annual Members and Associates Luncheon is an in-person event, held at a premiere downtown Toronto location, which features a prominent guest speaker or panel of presenters on a thought leadership topic of high relevance to the credit protection insurance/travel insurance/bancassurance sector in Canada. While our 2020 Annual Members and Associates Luncheon was converted to a virtual-only event due to COVID-19 restrictions, we are planning to hold the event in Q3 or Q4 in 2021, based on the optimistic expectation that widespread vaccination of the populace by that time will lead to a relaxation of public health guidelines on social distancing; permitted in-person gatherings of up to 250 people; and a return to a semblance of pre-pandemic normalcy. Should that not occur, our Annual Members and Associates Luncheon in 2021 will again be held virtually and there will be no limit on attendees from CAFII Associate companies.

CAFII Reception Events: Three Tailor-Made Profile-Raising, Networking and Business Development Opportunities Each Year

Opportunity to network with executives from CAFII Member companies, as well as insurance regulators, policy-makers, and allied industry Association representatives

CAFII's Receptions are in-person events typically held in April, June, and late November/early December each year, which are typically hosted by a Member company at its downtown Toronto corporate premises and usually feature a guest speaker who provides a short educational presentation of relevance to the CAFII Member and Associate audience. These recurring 2.5 hour, host bar Receptions (typically 5:00 to 7:30 p.m.) provide excellent networking and business development opportunities for CAFII Member and Associate representatives and other industry guests, which are enjoyed and eagerly anticipated by everyone in the CAFII

community.

CAFII stands ready to pivot back to holding in-person Reception events, as soon as vaccination program benefits take hold and public health guidelines allow for such. We are optimistic of being permitted to hold at least one in-person Reception event in 2021, likely in late November/early December, but are poised for an earlier re-introduction if a better-than-expected scenario emerges.

CAFII Webinars

Intelligence and insights via exclusive webinars with insurance regulator, policy-maker, and industry leader presenters

In this COVID-19-disrupted 2020 year, in which large in-person gatherings became impossible by mid-March, CAFII pivoted and organized a series of four highly rated educational webinars in June, July, August, and September, three of which featured panels of provincial/territorial insurance regulators and policy-makers from across Canada. Regardless of the timing of the relaxation of current social distancing guidelines and a return to a semblance of pre-pandemic normalcy, including permitted in-person events, we plan to continue with a program of periodic educational webinars on interesting, thought leadership-oriented topics. We plan to hold another four CAFII webinars over the course of 2021. There is no limit on the number of attendees from Associate companies at CAFII webinars.

With that as background, we cordially invite and encourage RSA Canada to join our Association and start to experience the significantly enhanced benefits of CAFII Associate status in 2021.

We strongly believe that your company will find, after a year's experience as a CAFII Associate, that the value of the benefits delivered far surpasses the \$4,800 price tag associated with this supporter/affiliate status (paid once per annum, in February each calendar/membership year); and that you'll want to renew year-after-year thereafter.

In that connection, we would like to offer to have a short virtual meeting with you (20 to 30 minutes over Zoom or MSTEams at any mutually convenient date/time between now and the end of January 2021) to discuss this invitation and answer any questions you may have about CAFII Associate status. Please let us know if that would be of interest to you.

Brendan Wycks
Co-Executive Director, CAFII
CAFII

Keith Martin
Co-Executive Director,