


CAFII Regulatory Presentation to Nova Scotia

Keith Martin <Keith.Martin@cafii.com>

Mon 2023-10-30 10:19 AM

To: McCarron, David <David.McCarron@novascotia.ca>; Deshmukh, Rahul P <Rahul.Deshmukh@novascotia.ca>; MacLeod, Angela L <Angela.MacLeod@novascotia.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

 1 attachments (9 MB)

CAFII Presentation Atlantic Tour Nova Scotia October 2023 FINAL.pptx;

Hello David, Rahul, and Angela,

On behalf of Brendan, myself, our CAFII colleagues, and the CAFII member company representatives in our delegation, thank you for meeting with us on October 18, 2023. We found the opportunity to share our presentation, hear your thoughts, and engage in a mutually beneficial dialogue to be extremely valuable and worthwhile.

As promised, I am pleased at this time to provide you with a copy of the Powerpoint deck we presented during our meeting.

As noted during the meeting, there are some parts of this CAFII Powerpoint that require contextual background and explanation, so please do not hesitate to reach out to me if you have any questions.

In addition, I would be pleased to present the deck again to any members of your policy-maker/regulatory Authority, if there is interest in that CAFII offer.

Our Association does request, however, that you only share the presentation internally, with those within your organization.

Thank you again, and we look forward to keeping in touch. If any of you are ever in Toronto, please do reach out to me as I would be delighted to have you as my guest over lunch.

--Keith

Keith Martin

Co-Executive Director / Co-Directeur général

Canadian Association of Financial Institutions in Insurance

L'association canadienne des institutions financières en assurance

keith.martin@cafii.com

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RE: Follow up from CAFII regarding Presentation to PEI

Lauren Keefe-Hogan <lkeefehogan@gov.pe.ca>

Mon 2023-10-30 10:35 AM

To: Keith Martin <Keith.Martin@cafii.com>; Robert Bradley <RABRADLEY@gov.pe.ca>; Curtis Toombs <catoombs@gov.pe.ca>
Cc: Steve Dowling <SDDOWLING@gov.pe.ca>; Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Hi Keith,

Thank you for forwarding the presentation. It was nice to meet you all. Hope you enjoyed the rest of your stay in PEI.

Regards,
Lauren

Lauren Keefe Hogan

Registry and Licensing Counsel
Manager, Registry and Licensing Services
Financial and Consumer Services Division
Office: 902-368-5653
Cell: 902-218-1389
Email: lkeefehogan@gov.pe.ca

Justice and Public Safety
Government of Prince Edward Island
1st Floor, Shaw Building (North Entrance)
105 Rochford Street
PO Box 2000
Charlottetown, PE C1A 7N8
www.PrinceEdwardIsland.ca

From: Keith Martin <Keith.Martin@cafii.com>

Sent: Monday, October 30, 2023 11:18 AM

To: Robert Bradley <RABRADLEY@gov.pe.ca>; Lauren Keefe-Hogan <lkeefehogan@gov.pe.ca>; Curtis Toombs <catoombs@gov.pe.ca>

Cc: Steve Dowling <SDDOWLING@gov.pe.ca>; Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Subject: Follow up from CAFII regarding Presentation to PEI

Hello Robert, Lauren, and Curtis,

On behalf of Brendan, myself, our CAFII colleagues, and the CAFII member company representatives in our delegation, thank you for meeting with us on September 21, 2023. We found the opportunity to share our presentation, hear your thoughts, and engage in a mutually beneficial dialogue to be extremely valuable and worthwhile.

As promised, I am pleased at this time to provide you with a copy of the Powerpoint deck we presented during our meeting.

As noted during the meeting, there are some parts of this CAFII Powerpoint that require contextual background and explanation, so please do not hesitate to reach out to me if you have any questions.

RE: CAFII Regulatory Presentation to Nova Scotia

McCarron, David <David.McCarron@novascotia.ca>

Mon 2023-10-30 10:29 AM

To: Keith Martin <Keith.Martin@cafii.com>; Deshmukh, Rahul P <Rahul.Deshmukh@novascotia.ca>; MacLeod, Angela L <Angela.MacLeod@novascotia.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Thank you Keith,

We certainly enjoyed having you all here at our offices. We appreciated CAFII's approach to an engaging conversation. The polling information was also insightful and helps us to better understand consumers from our side of the table as well.

We will reach out should anyone else within our Department be interested in your presentation.

Regards,

Dave



5th Floor, Provincial Building
1723 Hollis Street
Halifax, NS

David McCarron, CPA

Executive Director, Financial Institutions
Superintendent of Credit Unions, Trust and
Loan Companies, Insurance and Pensions

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From: Keith Martin <Keith.Martin@cafii.com>

Sent: Monday, October 30, 2023 11:19 AM

To: McCarron, David <David.McCarron@novascotia.ca>; Deshmukh, Rahul P <Rahul.Deshmukh@novascotia.ca>; MacLeod, Angela L <Angela.MacLeod@novascotia.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Subject: CAFII Regulatory Presentation to Nova Scotia

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Hello David, Rahul, and Angela,

On behalf of Brendan, myself, our CAFII colleagues, and the CAFII member company representatives in our delegation, thank you for meeting with us on October 18, 2023. We found the opportunity to share our

RE: CAFII Regulatory Presentation to Nova Scotia

Deshmukh, Rahul P <Rahul.Deshmukh@novascotia.ca>

Mon 2023-10-30 11:40 AM

To: Keith Martin <Keith.Martin@cafii.com>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>; McCarron, David <David.McCarron@novascotia.ca>

Hello Keith,

Thank you for sharing the presentation. It was great to meet all of you in our office.

Best regards

Rahul

Rahul Deshmukh
Manager(Acting), Financial Institutions
NS Finance and Treasury Board,
Office of the Superintendent of Insurance/Credit Union
T:902-424-5240
F:902-424-1298

Courier: 1723 Hollis Street, 5th Floor, Halifax, NS B3J 1V9
Mailing: PO Box 2271, Halifax, NS B3J 3C8

From: McCarron, David <David.McCarron@novascotia.ca>

Sent: Monday, October 30, 2023 11:30 AM

To: Keith Martin <Keith.Martin@cafii.com>; Deshmukh, Rahul P <Rahul.Deshmukh@novascotia.ca>; MacLeod, Angela L <Angela.MacLeod@novascotia.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Subject: RE: CAFII Regulatory Presentation to Nova Scotia

Thank you Keith,

We certainly enjoyed having you all here at our offices. We appreciated CAFII's approach to an engaging conversation. The polling information was also insightful and helps us to better understand consumers from our side of the table as well.

We will reach out should anyone else within our Department be interested in your presentation.

Regards,

Dave



Finance and Treasury Board
Financial Institutions

5th Floor, Provincial Building

David McCarron, CPA

Executive Director, Financial Institutions
Superintendent of Credit Unions, Trust and
Loan Companies, Insurance and Pensions

☎ 902-424-7552

RE: CAFII Presentation to Newfoundland and Labrador

Bishop, Jean E <JeanBishop@gov.nl.ca>

Mon 2023-10-30 10:31 AM

To: Keith Martin <Keith.Martin@cafii.com>; Adams, Kris <KrisAdams@gov.nl.ca>; Jones, Scott <ScottJones@gov.nl.ca>; Dutton, Sean <sdutton@gov.nl.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Keith

Thank you for a copy of the deck. Your briefing was very informative. Should you have any questions or wish to discuss any issues, please reach out to me anytime.

Kindest regards,
Jean

Ms. Jean Bishop, Director (she/her)

Consumer and Financial Services Division

Administrator of Private Investigations and Security Services

Director of Charitable Lottery Licencing

Director of Residential Tenancies

Registrar of Collection Agencies and Collectors

Registrar of Credit Reporting Agencies

Registrar of Direct Sellers

Registrar of Mortgage Brokers

Registrar of Payday Lenders

Registrar of Prepaid Funeral Services Sellers

Superintendent of Insurance

Superintendent of Real Estate Brokers and Salesperson

Department of Digital Government and ServiceNL

Government of Newfoundland and Labrador

P.O. Box 8700

St. John's, NL

A1B 4J6

Tel: 709-729-2717

From: Keith Martin <Keith.Martin@cafii.com>

Sent: Monday, October 30, 2023 11:53 AM

To: Bishop, Jean E <JeanBishop@gov.nl.ca>; Adams, Kris <KrisAdams@gov.nl.ca>; Jones, Scott <ScottJones@gov.nl.ca>; Dutton, Sean <sdutton@gov.nl.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Subject: CAFII Presentation to Newfoundland and Labrador

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Hello Jean, Sean, Scott, and Kris,

On behalf of Brendan, myself, our CAFII colleagues, and the CAFII member company representatives in our delegation, thank you for meeting with us on October 19, 2023. We found the opportunity to share our

Re: Thank you from CAFII

Steve Dowling <SDDOWLING@gov.pe.ca>

Mon 2023-10-30 10:46 AM

To: Keith Martin <Keith.Martin@cafii.com>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Thanks Keith. Happy to have assisted. Sounds good.

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From: Keith Martin <Keith.Martin@cafii.com>

Sent: Monday, October 30, 2023 11:15 AM

To: Steve Dowling <SDDOWLING@gov.pe.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>

Subject: Thank you from CAFII

Hello Steve,

I am long overdue to send you a sincere "thank you" for helping me and my colleagues in our visit to PEI on 21 September, 2023.

As it turned out, we had a very productive session with Robert Bradley, Lauren Keefe-Hogan, and Curtis Toombs, all of whom came to the session in person for 90 minutes. I was accompanied by my staff colleagues Brendan Wycks, Shanay Smith and Robyn Jennings, as well as a senior volunteer group, some in-person and some hybrid.

I know it would not have turned out this way if it were not for your intervention, and we are all very grateful to you.

I let your colleagues know that I would share the presentation with them, and I am going to send it to them, copy to you, by separate email in a few moments. If you or your colleagues ever have any questions, or would like me to make the presentation to some others in your team, please do not hesitate to reach out to me.

Also Steve, if ever you find yourself in Toronto, please do reach out to me as I would be pleased for you to be my guest over lunch.

Regards,

--Keith

Keith Martin

Co-Executive Director / Co-Directeur général

Canadian Association of Financial Institutions in Insurance

L'association canadienne des institutions financières en assurance

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