

**Agenda Item 6(I)**  
**April 4/23 Board Meeting**

**From:** Keith Martin <[Keith.Martin@cafii.com](mailto:Keith.Martin@cafii.com)>  
**Sent:** Wednesday, November 23, 2022 12:56:01 PM  
**To:** Elizabeth Gandolfi <[Elizabeth.Gandolfi@cwbank.com](mailto:Elizabeth.Gandolfi@cwbank.com)>  
**Cc:** Brendan Wycks <[brendan.wycks@cafii.com](mailto:brendan.wycks@cafii.com)>; Jake Becker <[jake.becker@cafii.com](mailto:jake.becker@cafii.com)>  
**Subject:** Follow up from CAFII

Hi Elizabeth!

Thank you so much for responding to my LinkedIn reach-out to you. I did notice that you had left Scotia for Canadian Western Bank, and I hope that has turned out well for you and that you are enjoying your new job.

I believe that Canadian Western Bank does offer credit protection insurance? Brendan and I thought that it might be worth exploring whether the services of our Association might be relevant for Canadian Western Bank, with the level of regulatory activity being so intense I do believe that our members find it essential to be engaged with CAFII and so I thought I would reach out to you about that possibility for your company.

Elizabeth, let us know if you think that an exploratory, low-key lunch might be possible for us to discuss that idea. Regardless of how such an exploratory discussion turns out, catching up with you would be great.

Look forward to hearing back from you,

Thanks,

--Keith

**Keith Martin**

Co-Executive Director / Co-Directeur général

Canadian Association of Financial Institutions in Insurance

**From:** Elizabeth Gandolfi <[Elizabeth.Gandolfi@cwbank.com](mailto:Elizabeth.Gandolfi@cwbank.com)>  
**Sent:** Saturday, January 21, 2023 3:34 PM  
**To:** Keith Martin <[Keith.Martin@cafii.com](mailto:Keith.Martin@cafii.com)>  
**Cc:** Brendan Wycks <[brendan.wycks@cafii.com](mailto:brendan.wycks@cafii.com)>; Jake Becker <[jake.becker@cafii.com](mailto:jake.becker@cafii.com)>; Michelle Kowalchuk <[Michelle.Kowalchuk@cwbank.com](mailto:Michelle.Kowalchuk@cwbank.com)>; Anthony Danda <[Anthony.Danda@cwbank.com](mailto:Anthony.Danda@cwbank.com)>  
**Subject:** Re: Follow up from CAFII

Sorry for delayed response.

Can we set up time to reconnect? Michelle can help set up for early March. CWB does offer Creditor Insurance.

Many thanks  
Elizabeth

**From:** Brendan Wycks  
**Sent:** Monday, March 20, 2023 11:39 AM  
**To:** 'Elizabeth Gandolfi' <[Elizabeth.Gandolfi@cwbank.com](mailto:Elizabeth.Gandolfi@cwbank.com)>  
**Cc:** Jake Becker <[jake.becker@cafii.com](mailto:jake.becker@cafii.com)>; 'Michelle Kowalchuk' <[Michelle.Kowalchuk@cwbank.com](mailto:Michelle.Kowalchuk@cwbank.com)>; 'Anthony Danda' <[Anthony.Danda@cwbank.com](mailto:Anthony.Danda@cwbank.com)>; Keith Martin <[Keith.Martin@cafii.com](mailto:Keith.Martin@cafii.com)>  
**Subject:** RE: Follow up from CAFII

Good morning, Elizabeth.

Thanks so much for meeting with Keith Martin and me for lunch on Thursday, March 2. We really enjoyed the catch-up dialogue with you and the opportunity to learn more about CWB and its interest in CAFII Initiation Membership.

Please see attached and below for the promised follow-up documents from CAFII, related to the benefits of membership in our Association and, more specifically, to CAFII Initiation Membership.

Those documents are

- a short, two-pager on the Benefits of CAFII Membership;
- the CAFII New Member Representative Orientation Package (which still requires a few minor updates, but is substantially complete and accurate) found at this link: [https://infocafii-my.sharepoint.com/:b/g/personal/info\\_cafii\\_com/EQRGm0tsgbNAjUH8MTn2pOoBPapaakSSu mMWmsetunl\\_Jw?e=jHzOAY](https://infocafii-my.sharepoint.com/:b/g/personal/info_cafii_com/EQRGm0tsgbNAjUH8MTn2pOoBPapaakSSu mMWmsetunl_Jw?e=jHzOAY). After you have a chance to look at the Orientation Package's Table of Contents, let us know if you would like us to prepare and send you a condensed version containing only those sections of most relevance to your CWB team members; and

- the CAFII Initiation Membership Application Form document (which includes background information about what this category of CAFII Membership is all about).

Keith and I look forward to an opportunity to chat further with you, Elizabeth, and/or with your CWB colleagues about the benefits of CAFII Initiation Membership and your company's interest in joining our industry Association.

Best regards and talk soon,

**Brendan Wycks, BA, MBA, CAE**

Co-Executive Director

Canadian Association of Financial Institutions in Insurance

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