

Agenda Item 7(a)
November 23/21 EOC Meeting

From: Brendan Wycks <brendan.wycks@cafii.com>
Sent: Monday, November 1, 2021 1:28 PM
To: Carmelina Manno <Carmelina_Manno@manulife.ca>; Monika Spudas
<Monika_Spudas@manulife.ca>; 'Anaar Jessa' <Anaar.Jessa@sunlife.com>; 'Apt, Sharon'
<Sharon.Apt@gwI.ca>
Cc: Keith Martin <Keith.Martin@cafii.com>; CAFII Events <events@cafii.com>; Jake Becker
<jake.becker@cafii.com>
Subject: Reorganizing/Rescheduling CAFII's Imminent Webinar Plans

Hello Carmelina and Monika (Manulife), Anaar (Sun Life), and Sharon (Canada Life):

The purpose of this message is to bring you into the loop, in follow-up to Keith's note below to Glen Padassery, FSRA's Executive Vice-President, Policy and Consumer Office, and Marlena Labieniec, Director of FSRA's Innovation Office, which is also directly related to the following brief excerpt from CAFII's October 29/21 submission to FSRA on its Fiscal Year 2022-23 Statement of Priorities and Budget

- *in that connection, CAFII is pleased to have had, on October 29, a preparatory dialogue meeting with Glen Padassery, FSRA's EVP, Policy and Consumer Office, and Marlena Labieniec, Director of FSRA's Innovation Office; and we will now be collaborating with them on a follow-up virtual event which will provide an opportunity for CAFII members to learn about FSRA's Innovation Framework and how to tap into it --*

Keith and I had a discussion this morning in which he recommended, and I agreed, that CAFII's best course of action would be to seize the day re the opportunity to have a CAFII webinar with FSRA presenters on its recently released "Innovation Framework" – which includes a regulatory sandbox mechanism – and to make a switch, such that we will stage that FSRA-based webinar later this month on November 29 or 30; and defer our plans to stage a CAFII webinar on life insurers' health/wellness incentivization programs and move it into January 2022.

Therefore, Carmelina/Monika, Anaar, and Sharon, we would like to propose the following January 2022 dates as possible dates for rescheduling the planned CAFII webinar on life insurers' health/wellness incentivization programs:

- Thursday, January 20, 2022;
- Monday, January 24, 2022;
- Tuesday, January 25, 2022;
- Wednesday, January 26, 2022;
- Thursday, January 27, 2022; and
- Monday, January 31, 2022.

Please consider those proposed January dates, consult with your respective health/wellness incentivization program presenters on their availability for a 75 minutes webinar with a 12 Noon or 1:00 p.m. Eastern start time on those dates, and get back to Meighan Pears (c.c.'d here as CAFII Events), Keith, and me by November 30.

Thanks very much for your understanding, flexibility, and co-operation.

Best regards,

Brendan Wycks, BA, MBA, CAE

Co-Executive Director

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

Sent: November-01-21 12:51 PM

To: Marlena Labieniec <Marlena.Labieniec@fsrao.ca>; Glen Padassery <Glen.Padassery@fsrao.ca>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; CAFII Events <events@cafii.com>; Jake Becker <jake.becker@cafii.com>

Subject: Follow up from CAFII

Hi Marlena, Glen,

It was great to talk to you both last Friday. Brendan and I think we could hold a very productive webinar with you on FSRA's new Innovation Framework. I think it would get good interest if we invited interested stakeholders like other regulators.

As a first step, we would like to propose one-hour on 29 November or preferably 30 November. Please let us know if you are available on one of those dates.

I think we would need to get a "save the date" invite out quickly, so I would also propose a 30-minute session this week to settle on some of the details. Please advise as to your availability, and I will book a meeting.

Looking forward to following up on this,

--Keith

Keith Martin

Co-Executive Director / Co-Directeur général

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