

**Read Only Agenda Item 7(a)
June 28/22 EOC Meeting**

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

Sent: April 20, 2022 11:41 AM

To: Lesli Martin <LesliMartin@pollara.com>

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Meighan Pears <events@cafii.com>; Jake Becker <jake.becker@cafii.com>; Danielle McLean <Danielle.McLean@cafii.com>

Subject: Query from CAFII

Hi Lesli,

I trust all is well. I am reaching out to you about an initiative CAFII is engaged in, of holding a series of webinars on a variety of topics every year. While this started out as a pivot from in-person events due to the pandemic, our Board likes the initiative so much that we intend to keep it as an ongoing part of our efforts. You can see examples of previous webinars, which we record and post on our website, at

<https://www.cafii.com/research/>

We are beginning our planning for the fall and thought a webinar with you, at which you could speak about broad trends in financial services, including shifting customer expectations coming out of COVID-19, could be very interesting. I know you have your fingers on the pulse of the Canadian industry and hearing your thoughts and insights on general developments in financial services, and even in the broader marketplace, would be very interesting. As you know, we have large banks and insurers as members, and we invite regulators and policy-makers from across the country to these webinars, so I think it would also be good exposure for Pollara and potentially a business development opportunity.

Please let me know if this is something you would consider, if so we are looking at a one-hour webinar from 1-2pm on either Wednesday, October 5 or Thursday, October 6, 2022.

Personal regards,

--Keith

Keith Martin

Co-Executive Director / Co-Directeur général

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From: Lesli Martin <LesliMartin@pollara.com>

Sent: April-21-22 10:52 AM

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

Cc: Brendan Wycks <brendan.wycks@cafii.com>; Meighan Pears <events@cafii.com>; Jake Becker <jake.becker@cafii.com>; Danielle McLean <Danielle.McLean@cafii.com>

Subject: RE: Query from CAFII

Hi Keith

I am, of course, more than happy to work with you on a webinar. I have done quite a bit of work in this area, which I know I have shared with you in the form of anecdotal comments. Unfortunately, I can't share those actual results in a more specific way, as the results belong to our clients. I could talk about it in a more general form, but I am not sure how satisfying that will be to the audience without actual numbers to back it up (or maybe that is just the researcher in me!)

Good news is that since it is in September, I have some time to gather some data for public release. Do you have ideas of specific areas that you feel the audience would be interested in?

I feel this is a bit of a rambling email to get to the final point of yes, I will figure something out and be happy to take part in the webinar.

Thanks,

Lesli