

***Agenda Item 7(c)
March 21/23 EOC Meeting***

From: Keith Martin <Keith.Martin@cafii.com>
Sent: Wednesday, November 23, 2022 12:56:01 PM
To: Elizabeth Gandolfi <Elizabeth.Gandolfi@cwbank.com>
Cc: Brendan Wycks <brendan.wycks@cafii.com>; Jake Becker <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>
Sent: Saturday, January 21, 2023 3:34 PM
To: Keith Martin <Keith.Martin@cafii.com>
Cc: Brendan Wycks <brendan.wycks@cafii.com>; Jake Becker <jake.becker@cafii.com>; Michelle Kowalchuk <Michelle.Kowalchuk@cwbank.com>; Anthony Danda <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: Friday, March 17, 2023 1:53 PM
To: Elizabeth Gandolfi <Elizabeth.Gandolfi@cwbank.com>; Keith Martin <Keith.Martin@cafii.com>
Cc: Jake Becker <jake.becker@cafii.com>; Michelle Kowalchuk <Michelle.Kowalchuk@cwbank.com>; Anthony Danda <Anthony.Danda@cwbank.com>
Subject: RE: Follow up from CAFII

Hi, 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.

Apologies for the delay in getting the requested CAFII background documents sent to you.

I will send the following over to you by Monday, March 20:

- Benefits of Membership in the Canadian Association of Financial Institutions in Insurance (CAFII);
- an MS365 drive link to the CAFII Orientation Package (currently being updated). This is a voluminous document of approximately 200 pages, but it has an excellent Table of Contents which allows you to hone in on sections of particular relevance. After you have a chance to look at it, you can ask us to send a condensed version containing only those sections of most relevance to your CWB team members; and
- our CAFII Initiation Membership Application Form, 2023.

Have a great weekend and talk to you again soon, Elizabeth.

Brendan Wycks, BA, MBA, CAE
Co-Executive Director, CAFII