

Plans for In-Person/Hybrid Presentation of CAFII's 2023 Research Results-Focused PowerPoint Deck to FSRA Staff Executives on November 15/23

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

Sent: Monday, September 18, 2023 2:03 PM

To: Glen Padassery <Glen.Padassery@fsrao.ca>; Huston Loke <Huston.Loke@fsrao.ca>

Cc: Erica Hiemstra <Erica.Hiemstra@fsrao.ca>; Swati Agrawal <Swati.Agrawal@fsrao.ca>; Brendan Wycks <brendan.wycks@cafii.com>; Robyn Jennings <Robyn.Jennings@cafii.com>; Shanay Smith <Shanay.Smith@cafii.com>

Subject: Offer from CAFII to Make a Presentation to FSRA on CAFII Priorities and Research Findings

Hello Glen, Huston,

I trust that this note finds you both well. By way of background, CAFII as part of its strategic plan seeks to share key messages and priorities with regulators and policy-makers across Canada, and in that connection we have a commitment to engage in dialogue with regulators and policy-makers in their own jurisdictions, no less than once every 18 months. Having said that, we had a period of hiatus in connection with the pandemic, but now we are engaging in these tours again. In May and June 2023 we visited 7 regulators and policy-maker authorities in the 4 western Canada provinces, and in May and October 2023 we will be visiting the four Atlantic Canada provinces.

At these meetings we make a 90-minute presentation which focuses on key regulatory and policy-maker priorities for CAFII; which shares some of our recent initiatives; and which also highlights the results of third-party insurance research we have commissioned. The presentation has been well-received as full of very relevant information for regulators and policy-makers, and has also allowed us to engage in very productive dialogue with our regulatory and policy-maker authorities.

Glen, Huston, I would like to offer to make this presentation to FSRA. I would offer to make it in-person in your offices, but with an MS Teams link also available for anyone who would like to participate virtually. I would likely be accompanied by a group of CAFII member representatives.

If this is of interest, please let me know and we can look at possible dates, possibly in October or early November.

Warm 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

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

Sent: Wednesday, October 4, 2023 11:39 AM

To: Nelly Ching <Nelly.Ching@fsrao.ca>

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

Subject: RE: Offer from CAFII to Make a Presentation to FSRA on CAFII Priorities and Research Findings
Thank you so much Nelly. Your first choice, **November 15 from 10-11.30am, works well for me.**

I will be bringing some CAFII members with me, and will provide you with a list closer to the date. If possible, we would like to make the meeting hybrid, with a virtual component. I can bring my laptop for the camera, would you be able to set up an MS Teams meeting so that I can invite our members who wish to join virtually? (Or does FSRA use a different virtual platform? Of course the same invite could be sent to FSRA attendees to participate virtually.) If those from FSRA who attend in-person are able to bring their laptop and join the virtual meeting, that is a better experience for the virtual attendees.

Let me know if you would like to discuss any of this, Nelly. We have found that when the meeting host invites the room, the technology works better. Perhaps you can let me know how audio works as well for the room I will be presenting in. I am hoping to be able to project my presentation onto a screen as well. Thank you again, I'll wait to hear back from you.

Regards,

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

From: Nelly Ching <Nelly.Ching@fsrao.ca>

Sent: Wednesday, October 4, 2023 4:18 PM

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>

Subject: RE: Offer from CAFII to Make a Presentation to FSRA on CAFII Priorities and Research Findings

Hi Keith,

Thanks for confirming the date and time and I am glad it works for your group.

Yes, we use MS Teams for audio/video meetings. I will double check with IT to ensure both audio and video equipment works well in the boardroom for this hybrid meeting. I've reserved a boardroom here which can accommodate 14-18 people. Please keep me posted when you have the in-person finalized.

With respect to virtual connection, I believe you can forward to participants with MS Teams link and they should be able to connect without any problem since you are presenting from your laptop via Team connection from our boardroom. You can provide me with the participants list when it is available, I can add them to the calendar invite directly, for sure, they should have no problem to join in.

In the meantime, I will send you an invite to block the time off on your calendars. Let me know your thoughts.

Nelly