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# Meeting Summary - January 17, 2020

## Ad Hoc Technical Advisory Committee for Missing Members in the Pension Sector

### Meeting Summary

**Date:** Friday, January 17, 2020

**Time:** 9:30 a.m. to 12:30 p.m

**Location:** Financial Services Regulatory Authority of Ontario

This summary sets out the key points discussed at the January 17, 2020 meeting.

### Recap/Follow-up Discussions of Working Group Meetings

Working groups were formed after the November 15, 2019 TAC meeting to support and advise FRSA on new guidance associated with searching for missing members and the proposed Missing Member Registry.

### Searching Guidance

The Missing Member Search Guidance working group presented their document to the TAC and discussed the need to focus on messaging and the clarification of responsibilities. The TAC also discussed example cases that described approaches administrators may take in specific situations. FSRA will incorporate feedback received from the committee in the draft guidance and a revised document will be discussed at the February 14, 2020 TAC meeting.

### Biennial Statement Waiver Process

A revised Biennial Statement Waiver guidance document, reflecting recent legislative changes to the waiver process, was also circulated to the TAC. The main discussion points centred on the application process. FSRA will incorporate feedback received from the committee in the





draft guidance and a revised document will be discussed at the February 14, 2020 TAC meeting.

### **Missing Member Registry**

There was a fulsome discussion of the options to consider for a Missing Member Registry. It was suggested that a Working Group be created in order to further discuss potential registry structure and function not currently contemplated by the legislation.

The TAC will conclude its work on February 14, 2020.

### **Attendance Record**





Invited/Attended	Company Name	Attendance Status (A)ttended; (R)egrets; (S)ubstitute; (TC)Teleconference
Caroline Blouin	FSRA-EVP and TAC Chair	A
Anna Zalewski	Ontario Teachers Pension Plan	R
Michael McAllister	Ontario Teachers Pension Plan	S
Doug LeFaive	Goldblatt Partners, LLP	A
Glorie Alfred	Osler	A
James Hoffner	SunLife	A





James Pierlot	Blue Pier	A
John Hnatiw	Morneau Shepell	A
Jennifer Agnew	BMKP Law LLP	A
Joseph Tang	Mercer	A
Karen Kahansky	Willis Towers Watson	A
Kimberly Houston	McAteer Group	R
Melodie Mason	CSA Group	A
Nadine Orr	RBC Insurance	A





Patrick Rettig	Unifor	A
Paul Migicovsky	Ontario Municipal Employees Retirement System (OMERS)	A
Scott Linnell	Fiat Chrysler Canada	A
Tracey Ball	Healthcare of Ontario Pension Plan (HOOPP)	A
Vinod Armoogum	MoF	R
Maureen Johnson	MoF	A
Andrew Bucci	MoF	A





Monica Chu	MoF	A
Mark Eagles	FSRA	A
Cynthia Crysler	FSRA	A
Lynn Barron	FSRA	R
Michael Palozzi	FSRA	A
Anne Slivinkas	FSRA	A
Jessica Rose	FSRA	A
David Bartucci	FSRA	A

