



**CLIEDIS**  
The Executive Summit  
Bridge Group (BG) Charter  
for *the initiative*

## Mandate of the Bridge Group (BG)

The mandate of the Bridge Group will be to prepare a proposal for presentation to industry participants and to outline the required commitment to develop a complete model for *the initiative*.

The Bridge Group will:

- Develop a high level business proposal statement to clarify the purpose of the initiative, taking into account the benefits, costs, constraints and assumptions that were identified at the summit.
- Identify any regulatory issues that may impact the initiative
- Identify the specific information that industry participants will need in order for them to make a decision about continuing with *the initiative*. These questions will include whether the scope and proposed plan are accurate.
- Determine the amount of money and resources that participants should contribute to seed further development, commensurate with their company's resource and perceived benefit.
- Consider what CLIEDIS' involvement could be in further development
- Estimate the people resources required to continue further development of *the initiative*, including resources for:
  - a technical architecture working group to bring forth 2 to 4 possible architecture models for consideration
  - a business architecture working group to identify business scope and practices of the initiative
  - a governance group
  - a working group focused on Advisor engagement strategies/issues/goals/approaches
  - other groups, as may be identified during Bridge Group discussions
- Develop strategy for contacting companies for getting their financial and resource commitment to continuing *the initiative*.
- Make decision, based on industry commitment, whether the initiative will move forward.
- Communicate with the press, in groups of 3 or more, on an ongoing basis to ensure we build on the momentum of the summit.

The estimated lifespan of the Bridge Group will be one to three months.

## Bridge Group Members

Name	Company	Role
Scott Sinclair	Transamerica Life of Canada	Carrier Representative
Byren Innes	NewLink Group	Advisor Representative
Mike Lewis	London Life / GWL / CLA	Carrier Representative
Andy White	Manulife Life	Carrier Representative
Susan Hunter	Sun Life	Carrier Representative
James Betton	Transamerica Life of Canada	Carrier Representative
Julie Parrott	CLIEDIS	CLIEDIS Representative
Cindy Wang	CPP	Distributor Representative
John Hamilton	Financial Horizons	Distributor Representative
Yves Gosselin	Force financière Excel	Distributor Representative
Jamie McGeachin	HUB Financial / CAILBA	Distributor Representative
Heather Clarke	Investors Group	Distributor Representative
Ernie Nichiporik	Credential	Distributor Representative
Paul Brown	Worldsource	Distributor Representative
Marc Chenier	Hooper Holmes	Paramedical Representative
Shari Gottschalk	Medisys	Paramedical Representative
Nathan Carey	AGEman Solutions	Vendor Representative
Erin Anders	eBix Exchange	Vendor Representative
Amir Jafri	FundSERV Inc	Vendor Representative
Dave Kemp	HP	Vendor Representative
Lorne Brown	Illustrate inc	Vendor Representative
Tim Fitzpatrick	VirtGroup	Vendor Representative
Laird Elliott	Winfund	Vendor Representative

### Role of the Bridge Group

The BG will leverage their expertise, experience and contacts to get commitment to move forward with *the initiative*. They understand the strategic implications and outcomes of *the initiative*, appreciate its significance for some or all major stakeholders, will represent their interests, be genuinely interested in the initiative and be an advocate for broad support for the outcomes being pursued in the project.

The bridge group will do the work to accomplish the tasks identified in the Mandate of the Bridge Group section of this document. This will be accomplished with a short series of meetings, via conference calls and/or face-to-face meetings to resolve the issues.

## Accepted Principles

The BG will work with the followed principles:

- The Bridge Group will act as a sub-committee of CLIEDIS and be made up of members from the carrier, distributor, vendor and advisor categories.
- The lifespan of the committee is one to three months. Their work will be completed once a decision has been made whether to go forward or not with *the initiative*.
- Members understand the value of straight through processing for the industry.
- Moving forward, any solution for the industry will ensure that data standards and standardizing of code values will be part of the solution.
- Any solution should be based on a cost recovery model.
- Transparency in the industry is imperative and update related to Bridge Group work will be made available to all CLIEDIS members and industry participants. Once the next steps are approved, only CLIEDIS member participants will be kept fully informed of progress details.