



**Registrant Outreach Workshop**

June 26, 2015



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**Welcome Registrant Outreach Workshop**

Sandy Jakab, BCSC



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**Status Updates Registrant Outreach Workshop**

Mark French, BCSC (Moderator)



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 British Columbia  
Securities Commission

## Crowdfunding & On-line Advising Registrant Outreach Workshop

Denis Silva, BCSC



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### Crowdfunding – Registered Funding Portals



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### On-line Advising



- Technology neutral

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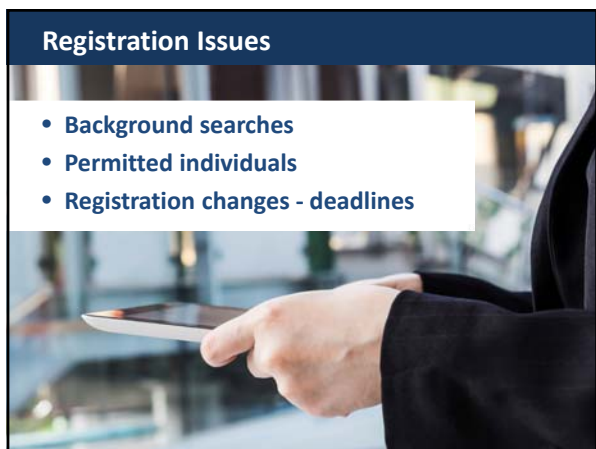
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## CRM2 Transition Update Registrant Outreach Workshop

Vida Mehin, BCSC



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### CRM2 Amendments



- What?
- Why?

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### Who do they apply to?

- All dealers and advisers



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### Who benefits from the amendments?



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### CSA blanket order relief



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### More time to meet the 2015 requirements



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### Market value determination

- Prescribed hierarchy of valuation methods



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### Reporting position cost



149	(34.4%)	1,758	149	5,1
83	(69.9%)	31	1,595	183
(48.9%)	2,313	92		
118		2,028		
		220		

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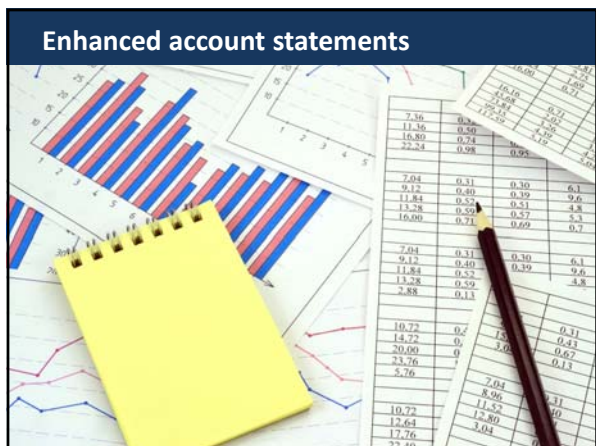
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### Enhanced account statements



7.36	0.3		
11.38	0.50		
16.80	0.71		
22.24	0.98	0.95	
7.04	0.11	0.30	6.1
9.12	0.40	0.39	9.6
11.84	0.52	0.51	3.8
13.28	0.55	0.47	5.3
16.00	0.71	0.69	0.7
7.04	0.11	0.30	6.1
9.12	0.40	0.39	9.6
11.84	0.52	0.39	4.8
13.28	0.55		
2.88	0.11		
10.72	0.5	15	0.31
14.72	0	10	0.43
20.00	0	10	0.67
23.76			0.13
5.76			
10.72		7.04	
12.64		8.96	
17.76		11.52	
22.40		12.80	
		1.04	

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**Other statements**

- Additional statements
- IFM account statements
- SPD statements

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**2016 investment performance reporting**



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**2016 investment performance reporting**

- No comparative data required



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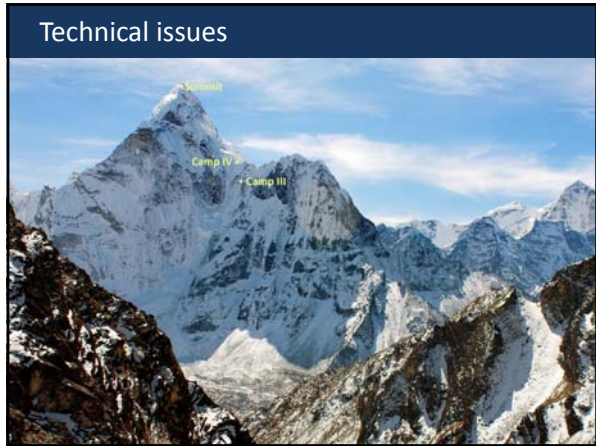
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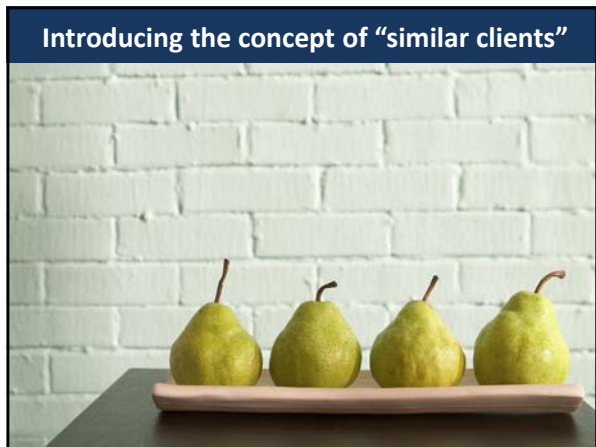
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### Position transfer date disclosure

- Not required



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### IPF disclosure suspended



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### What do others think?



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**Vida Mehin, Senior Legal Counsel**

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Tel: 604-899-6596



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**Registrant Outreach Workshop**



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**Panel Discussion  
CRM2 Topical Questions**

Mark French, BCSC (Moderator)  
Jason Brooks, Borden Ladner Gervais  
Mark Hughes, HughesLittle Investment Management Ltd.  
Kevin Kirkwood, Alitis Investment Counsel Inc.  
Vida Mehin, BCSC



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**Householding**



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**Account statements**



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**Performance reporting**



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**Market value**



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**Questions**



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