

## MAY 30, 2012 ISSUE

### PUBLIC INFORMATION SESSION: INVESTMENT SUITABILITY AND LOSS ASSESSMENT PROCESS

Last year, OBSI issued a consultation paper detailing the investment suitability and loss assessment process used in assessing the merits of investor complaints. After considering the feedback received, OBSI's Board of Directors recently proposed a number of [enhancements to the process](#) that are now out for public comment.

During this new consultation period, OBSI is organizing an information session on the methodology that is open to the general public. Individuals will have an opportunity to ask questions, discuss the methodology and provide feedback to OBSI staff. This session mirrors sessions being organized by the Investment Industry Regulatory Organization of Canada (IIROC) and the Mutual Fund Dealers Association (MFDA), invitations to which were sent directly by IIROC and the MFDA to their members.

#### Session details

Date: Thursday, June 14th  
6:00pm-8:00pm (EDT)

Location: Downtown Toronto, with teleconference option.

Language: Presenters will be speaking in English, though questions may be asked in French via a translator.

Please note that pre-registration is mandatory and space is limited. Seating will be on a first come, first serve basis. The venue address and teleconference number will be provided directly to registered attendees.

To accommodate all interested individuals, IIROC and MFDA members are requested to attend the sessions organized by their respective self-regulatory organizations rather than this session for the general public.

**To register, please email [publicaffairs@obsi.ca](mailto:publicaffairs@obsi.ca) or call Christina Vivani at 1-888-451-4519 ext. 2276.**

Individuals are asked to register no later than **June 11, 2012**.