

*'Celebrating Over 40 Years of Self-Regulation'*

## RIBO REVIEW

"The RIBO News You Need to Know"



### IRIS LAUNCH

On February 16, we launched our broker portal system. You should have received an email invitation from [invites@microsoft.com](mailto:invites@microsoft.com) on behalf of RIBO to gain access to the portal.

If you haven't tried accessing or using the system, we recommend following our [IRIS instructions](#), which include helpful resources such as a Quick Start Guide, Video Tutorials and a Guidebook with step-by-step instructions and FAQs.



### CODE OF CONDUCT SPOTLIGHT: CONFIDENTIALITY

In your role as a broker, you have a need to understand the details of your client's personal circumstances and affairs. That is a sacred trust and you owe a duty of confidentiality to every client, without exception.

Learn more about your responsibilities relating to confidentiality on pages 17 and 18 of the [Code of Conduct](#).



## MANAGING GENERAL AGENTS

Regulating Property and Casualty Managing General Agents (MGAs) is one important way that we ensure fair treatment of customers and strengthen public confidence.

For over two decades, we have regulated MGAs who have chosen to be held accountable to RIBO's highest professional standards, regulations and [Code of Conduct](#).

We continue to propose solutions for overseeing MGAs in collaboration with the government and other stakeholders.



## MAINTAINING E&O AND FIDELITY INSURANCE

Principal Brokers have a responsibility to maintain Errors and Omissions Insurance and Fidelity Insurance, in accordance with [R.R.O. 1990, Reg. 991, section 20](#) and [RIBO Guidelines](#).

Principal Brokers must [upload their certificates](#) on our website on the renewal date of the certificate(s). Click [here](#) to learn more.

### Online Broker Services:

- Principal Brokers can provide firm-related updates online using our [Principal Broker Menu](#).
- Staff lists and license restriction levels are now available in IRIS.

### Helpful Resources:

- Recently Approved [Continuing Education Courses](#)
- Discipline Committee [Current Decisions](#)

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