



Outlook

Re: Scrivens Conflict of Interest?

From roy.evans@ymail.com <roy.evans@ymail.com>

Date Sun 2024-04-14 6:49 PM

To Joseph Dilworth <mastersparky@hotmail.com>; Tasha Peric CMG <tperic@condogroup.ca>

Cc Laundry <acs161@rogers.com>; Chrissie <c_kalonga@hotmail.com>; 'Angie' <angieacres@live.ca>

I am a Partner as of 2 years ago and had zero benefits to gain on these investments. I only help with the paperwork to make it easy for the other board members. Also, I ask the other board members to find the best commercial GIC rate possible at the time of renewal. If you can get better rates for the owners, great, you get to quarterback the process and have the other board members sign new documentation.

Also Joseph, I don't have a license to sell investments in Canada and legally cannot receive a commission due to this. I'm an accountant, but I'm sure you've researched this already.

Roy

On Thursday, April 11, 2024 at 04:36:08 PM EDT, Tasha Peric CMG <tperic@condogroup.ca> wrote:

Hello Joseph,

The Board has always been aware that Roy is employed with Scrivens. The investments are not arranged, confirmed or put in place through Roy directly and also require instruction by a majority of the Board. Management is the point of communication between the investment representative and Scrivens. Roy does not have a material interest in any investments put in place so as far as I am aware, there is no conflict of interest. We can discuss at the next Board meeting if there are any further questions or issues.

Kind regards,

Tasha Peric, OLCM

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From: Joseph Dilworth <mastersparky@hotmail.com>
Sent: Wednesday, April 10, 2024 7:58 PM
To: Tasha Peric CMG <tperic@condogroup.ca>
Cc: roy.evans@ymail.com; Laundry <acs161@rogers.com>; Chrissie <c_kalonga@hotmail.com>; 'Angie' <angieacres@live.ca>
Subject: Scrivens Conflict of Interest?

Tasha,

On the first page of the balance sheet it states 242000.00 Investment-Reserve-Interest Scrivens Reserve 8486.52.

I'm not sure if anybody is aware of this but what makes the situation interesting is that Roy is a partner at Scrivens.

Could you please clarify what is going on there as it appears to be a conflict of interest.

See the link and screen shot.

<https://www.scrivens.ca/about>



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Scrivens is an Ontario insurance broker and financial advising firm located in Ottawa.

www.scrivens.ca

Joseph