



South Western Insurance Group Limited  
105-21 Four Seasons Place  
Toronto, Ontario M9B 6J8

December 29, 2022

**RE: AMALGAMATION OF MEDTHREE INSURANCE GROUP INC. O/A MEDTHREE INSURANCE MANAGERS INC., O/A GROUPE D'ASSURANCE MEDTHREE WITH SOUTH WESTERN INSURANCE GROUP LIMITED**

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We are pleased to advise that effective January 1, 2023, MedThree Insurance Group Inc. o/a MedThree Insurance Managers Inc., o/a Groupe d'Assurance MedThree ("**MedThree**") will amalgamate with South Western Insurance Group Limited ("**Former SWG**"), to form a new corporation that will carry on under the legal name "South Western Insurance Group Limited" ("**New SWG**"). The integration of these well-established insurance businesses will reduce and/or eliminate operational overlap. The amalgamation will allow for improved customer service through the integration of their respective resources.

In connection with the amalgamation, the New SWG is adopting the trade name "MedThree Insurance Group" in each province and territory, where permitted by law to continue the business written by Old MedThree. As a result of the amalgamation, the following changes will occur effective January 1, 2023:

- Renewals, endorsements, policy documents and marketing materials of the New SWG will now use the "MedThree Insurance Group" business name in connection with all MedThree business conducted the by New SWG.
- Business cards and email signature blocks of MedThree brokers will be updated to reflect the Former SWG branding, along with the newly adopted "MedThree Insurance Group" business name, where applicable.
- The address and contact information of Former SWG will be used by New SWG in connection with all MedThree business.
- There is no changes to the banking information of MedThree and the New SWG.
- New SWG will continue to maintain the same broker management system for all MedThree business.



- All licensees under MedThree will be transferred to the New SWG in all applicable jurisdictions. In addition, the business name "MedThree Insurance Group" will be added to all New SWG insurance licenses.
- MedThree brokers will use the New SWG's internal and external policies and procedures including, but not limited to, client invoicing, complaint handling and privacy.

Please feel free to contact Colleen Bliss, Compliance Officer by phone at 1-800-668-4275 Ext 1227 or by email at [colleen@threeholdings.com](mailto:colleen@threeholdings.com), should you require further information.

Sincerely,

A handwritten signature in blue ink, appearing to read "John Barclay".

John Barclay  
President  
South Western Insurance Group Limited  
MedThree Insurance Group Inc.