

Canadian Public Sector Pensions and Benefits Conference



May 5-6, 2015

The Fairmont Winnipeg | Winnipeg, Manitoba

Canadian Legal and Legislative Update

May 7-8, 2015

The Fairmont Winnipeg | Winnipeg, Manitoba

**Register by March 26
to save with the early
registration discount.**

Fairness and Equity in Pensions and Benefits



Photo: Dan Harper

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International Foundation
OF EMPLOYEE BENEFIT PLANS



CANADA

Education | Research | Leadership

Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015

The Fairmont Winnipeg | Winnipeg, Manitoba

Transformation continues in today's government, and it is more important than ever for those who serve in the public sector to find creative and innovative solutions to manage change in order to ensure the viability of pension and health and welfare funds for their members.

The Canadian Public Sector Pensions and Benefits Conference offers an opportunity to learn firsthand from industry experts who will address the latest issues facing public sector plans today. The program focuses on plan design, cost-containment and communication strategies for both pensions and benefits. Don't miss this opportunity to learn alongside your peers who face similar challenges.

Benefits of Attending

- Learn from leading pension and benefits professionals about the specific issues you face in your role.
- Experience learning from a forum of your peers and discover best practices in other systems.
- Hear about strategies that could save your fund money in the short and long term.
- Networking opportunities with peers and other professionals
- Registration includes two continental breakfasts, two luncheons, a welcome reception at the Fairmont and a special event at the Canadian Museum for Human Rights.

Who Should Attend?

This program is designed for trustees, administrators, professional advisors and others in the Canadian public sector, including federal, provincial, municipal, educational, health and community service sectors.

Accompanying Educational Program

Canadian Legal and Legislative Update, May 7-8

Program Discount

Save \$250 when you register for both the Canadian Public Sector Pensions and Benefits Conference and the Canadian Legal and Legislative Update. Use discount code Public15 to save.

Visit www.ifebp.org/canadape for updates.

Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015

TUESDAY, MAY 5

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00-9:00 a.m.

Financial Literacy and Pension Reforms: A View From Italy

Pension reforms have technical and political features and are meant to motivate changes in behavior. Their effectiveness depends on the ability of citizens to recognize and generally approve their necessity and design. Financial literacy has important implications not only for personal wealth formation but also for pension reforms. Without a basic understanding by citizens, reforms risk having little or no effect or even being reversed. This is particularly true of pension reforms because of their profound impact on people's life plans. The 2011 Italian pension reform is a case in point.

Keynote Speaker: Elsa Fornero
Chair of Macroeconomics
University of Turin
Turin, Italy

9:15-10:15 a.m.

Alternative Investments: Meeting Your Fiduciary and Social Governance Objectives

- Strategies for stabilizing funds
- Meeting ESG goals
- Public plan investments in *public-private* partnerships (P3)

Speaker: Tyler Smith
Consulting Actuary
Benchmark Decisions Ltd.,
The PBAS Group
Winnipeg, Manitoba

TUESDAY, MAY 5 (CONT.)

10:30-11:30 a.m.

Are Public Pension Plans Fair? Perception vs. Reality

- Portrayal of public pensions in the media
- Alternate views of public pensions
- Changing nature of pensions in Canadian society
- Preserving public pension plans
- Expanding retirement income for all Canadians

Speaker: Kevin Skerrett
Senior Research Officer
Canadian Union of Public Employees (CUPE)
Ottawa, Ontario

11:30 a.m.-12:45 p.m.

Luncheon

12:45-1:45 p.m.

Public Sector DC Plans: Saskatchewan's Experience

- The story of a small public sector pension plan becoming Canada's largest defined contribution pension plan
- Examining the ever-evolving governance of a growing DC plan
- Members and retirement—a focus on building and enhancing services

Speaker: Ann Mackrill
Executive Director
Public Employees Benefits Agency
Regina, Saskatchewan

“*Enjoyed the timely and relevant topics, presenters and opportunities to meet with other attendees.*”

Johanna Morrow
Trustee
BC Public Service Pension Plan

Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015

TUESDAY, MAY 5 (CONT.)

2:00-3:00 p.m.

When the Consolidation of Public Pension Plans Makes the Most Sense

The merging of pension plans isn't always a good idea but, given the right conditions, the benefits for all concerned are significant and real. A good merger brings efficiencies, reduces costs and manages risks better than the pension plans operating independently. This session will examine a real-life innovative and comprehensive proposal that has been three years in the making and would see interested single-university pension plans exit the pension management business to join an existing multi-employer college plan to create predictable costs and more secure benefits at a lower risk.

Speaker: Derek Dobson

CEO and Plan Manager
Colleges of Applied Arts and
Technology (CAAT) Pension Plan
Toronto, Ontario

3:15-4:15 p.m.

Open Forum

This interactive forum continues the discussion from the two previous sessions on public sector pension plans. Get a bird's-eye view from current practitioners who will expand upon their case studies.

Panelists:

Derek Dobson
Ann Mackrill

4:30-5:30 p.m.

Welcome Reception—Fairmont

Guests welcome

WEDNESDAY, MAY 6

7:00 a.m.-4:00 p.m.

Registration/Information

7:00-8:00 a.m.

Continental Breakfast

8:00-9:00 a.m.

Joint Governance: 25 Years Later

- Is it working? Key aspects
- What are the challenges?
- Role of government
- Sustainability—What does the future hold?
- Labour vs. management perspectives

Co-Speakers:

Mark Gaudet

Assistant Deputy Minister
Pensions and Employee Benefits Division
Province of New Brunswick
Fredericton, New Brunswick

Bob Romphf

Labour Relations Officer
Manitoba Nurses Union
Winnipeg, Manitoba

9:15-10:15 a.m.

Fraud, Waste and Abuse in Health Care

- Overview of fraud problems in health care
- Tackling the waste and abuse problem in health care
- What can we learn from clinical efforts to “choose wisely” in health care?
- Health care fraud cases

Speaker: Joel Alleyne

Executive Director
Canadian Health Care
Anti-fraud Association
Toronto, Ontario

Visit www.ifebp.org/canadape for updates.

Canadian Public Sector Pensions and Benefits Conference

May 5-6, 2015

WEDNESDAY, MAY 6 (CONT.)

10:30-11:30 a.m.

Disability: Accommodation and Management

- Legislative history
- Defining the duty to accommodate
- Disabled employee's responsibility
- Relief from duty to accommodate/defining undue hardship
- Keys to successful accommodation
- Help with managing

Speaker: Ron Ferguson

Regional Manager, Disability Management Service Office
The Great-West Life Assurance Company
Winnipeg, Manitoba

11:30 a.m.-12:45 p.m.

Luncheon

12:45-1:45 p.m.

EAPs and Employee Wellness in the Digital Age

This interactive, experiential session will examine how innovative online technologies and clinical best practices are being leveraged to support employees today and how they are forming the foundation of the next generation of tech-savvy EAPs and integrative wellness programs. Particular attention will be paid to how to improve employee engagement and productivity in the workplace.

Co-Speakers:

Heather Kaufman

Vice President, National Partnerships
Morneau Shepell
Toronto, Ontario

Barb Veder

Vice President Clinical Services and Research Lead
Morneau Shepell
Ottawa, Ontario

WEDNESDAY, MAY 6 (CONT.)

2:00-3:00 p.m.

Mental Health, Mental Illness and the Workplace: What Works At Work?

Dr. Cohen will discuss how employers can and do promote the mental health of their workforces as well as best respond to the mental health problems and illnesses some of their employees will inevitably experience. She will talk about the costs of not meeting the mental health needs of workers as well as the cost offsets for employers and society when mental health needs are met early and effectively. Finally, she will address the issues related to policy and culture that can impede and enhance how well Canada manages its mental health.

Speaker: Karen Cohen

Chief Executive Officer
Canadian Psychological Association
Ottawa, Ontario

3:15-4:15 p.m.

Open Forum

The two previous sessions will raise a lot of important issues pertaining to mental health in the workplace and employee engagement in EAPs and wellness programs. Take this opportunity to learn more from all three experts.

Panelists:

Karen Cohen

Heather Kaufman

Barb Veder

5:00-7:00 p.m.

Museum Reception

Canadian Museum for Human Rights

Speaker: Gail Stephens

Interim President and CEO
Canadian Museum for Human Rights (CMHR)

Museum Reception

The Canadian Museum for Human Rights (CMHR) is the first national museum to be built in nearly half a century and the first outside the National Capital Region.

Canadian Public Sector Pensions and Benefits Conference and Canadian Legal and Legislative Update Museum Reception

Wednesday, May 6, 5:00-7:00 p.m.

This special event is free to attendees (and guests) of either conference and includes a speech by the Interim President and CEO of the Museum, Gail Stephens, free access to the museum exhibits (until 8:00 p.m.), and hors d'oeuvres and beverages.

- I will attend (complimentary).
- I will attend and bring a guest (complimentary).
- I will not attend the reception.

CUSTOMER INFORMATION (Please print clearly)

First name _____ M.I. _____

Last name _____

GUEST INFORMATION (Please print clearly)

First name _____ M.I. _____

Last name _____

R.S.V.P. by Friday, April 10, 2015.



E-mail completed form to edreg@ifebp.org.



Mail the form to: International Foundation—Conference, P.O. Box 2406, Station A, Toronto, ON M5W 2K6



Fax form to (262) 786-8650.



For information, e-mail edreg@ifebp.org, or phone (905) 361-2822 or toll-free (844) 809-2698.

About the Location

The vibrant, cosmopolitan city of Winnipeg, Manitoba is the location for this year's Canadian Legal and Legislative Update and the Canadian Public Sector Pensions and Benefits Conference. Winnipeg offers diversity, culture and history.



The Fairmont Winnipeg

Fairmont Winnipeg, located in the heart of downtown Winnipeg, Manitoba, provides luxury guest rooms and excellent service and is located just a short distance from the top must-see attraction in Winnipeg—the Canadian Museum for Human Rights.

Conference Room Rate:

C\$239 single/double—Fairmont room category

Hotel reservation deadline: April 6, 2015

Canadian Legal and Legislative Update

May 7-8, 2015

The Fairmont Winnipeg | Winnipeg, Manitoba

The Canadian Legal and Legislative Update is the **preeminent source** for the latest in pensions and benefits legislation. Join us in Winnipeg, Manitoba for the annual update on recently enacted and proposed legislation and regulations, presented in a convenient 1½-day program.

Take this opportunity to get the information you need to better handle the changes taking place in Canada relating to pensions and benefits issues.

Benefits of Attending

- Hear from industry experts, practitioners and government representatives.
- Focus on the critical information you need to know now with fresh and relevant topics.
- Gain a deeper understanding of the issues affecting the pensions and benefits industry and their effect on your funds.
- Networking opportunities at a special welcome reception on Thursday evening from 5:00 to 6:00 p.m.
- Registration includes two continental breakfasts, luncheon on Thursday, beverage breaks and a special event at the Canadian Museum for Human Rights on Wednesday, May 6.

Program Discount

Save \$250 when you register for both the Canadian Public Sector Pensions and Benefits Conference and the Canadian Legal and Legislative Update. Use discount code Public15 to save.

Who Should Attend?

This program is specifically designed for labour and management multi-employer trustees, public service trustees and professional advisors looking to keep up with the latest legal and regulatory developments.



The International Foundation is implementing green initiatives for this meeting to eliminate waste and reduce the amount of paper distributed. Instead of binders of paper handouts, presentation materials will be available online—accessible under password protection by registrants only—three business days before and 45 days after the program. Further details will be provided to registrants before the meeting.

Visit www.ifebp.org/canupdate for updates.

Canadian Legal and Legislative Update

May 7-8, 2015

THURSDAY, MAY 7

7:30 a.m.-4:45 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:15 a.m.

Why We Need an Ontario

Retirement Pension Plan (ORPP)

- Hear about the Minister's formal consultations with individuals, businesses, labour and other organizations, and communities throughout Ontario.
- Discover the key design issues and implementation details.
- Get the most up-to-date information on this historic legislation.

Keynote Speaker:

Hon. Mitzie Hunter (invited)

Associate Minister of Finance
Ontario Retirement Pension Plan
Toronto, Ontario

9:30-10:30 a.m.

Is There Really a Pension Crisis?

Two Expert Views

More than 60% of Canadian workers are without a workplace pension plan, and workplace coverage continues to decline. At the same time, Canadians are living longer. These trends are causing many people to question the adequacy of voluntary savings and the ability of the Canada Pension Plan to meet the retirement needs of the average Canadian worker.

Malcolm Hamilton and Jo-Ann Hannah are two experts with opposing but equally compelling arguments about the need for, and merits of, Ontario's proposed ORPP and CPP expansion. They will also speak to other retirement solutions.

Co-Speakers:

Malcolm Hamilton

Senior Fellow
C.D. Howe Institute
Toronto, Ontario

Jo-Ann Hannah

Director, Pensions and Benefits
Unifor
Toronto, Ontario

THURSDAY, MAY 7 (CONT.)

10:45-11:45 a.m.

Ask the Experts Panel

Mr. Hamilton and Ms. Hannah will take your questions and comments, which should make for a very lively discussion and debate.

Panelists:

Malcolm Hamilton

Jo-Ann Hannah

11:45 a.m.-1:00 p.m.

Luncheon

1:00-2:15 p.m.

Socially Responsible Investment— Do I Have to?

- What is socially responsible investment?
- Can nonfinancial criteria be considered when making pension plan investment decisions?
- Must nonfinancial criteria be considered?
- How do you document these considerations in minutes, investment policies and plan documents?

Co-Speakers:

Randy Bauslaugh

National Practice Leader, Pension,
Benefits and Executive Compensation
McCarthy Tétrault LLP
Toronto, Ontario

Michael Jantzi

Chief Executive Officer
Sustanalytics
Toronto, Ontario

2:30-3:30 p.m.

Current Case Law: Relevance for Plan Sponsors and Trustees

A review of important recent developments in the case law across Canada and the impact on pension and benefit plans.

Speaker: J. J. Burnell

Partner
Aikins, MacAulay & Thorvaldson LLP
Winnipeg, Manitoba

Canadian Legal and Legislative Update

May 7-8, 2015

THURSDAY, MAY 7 (CONT.)

3:45-4:45 p.m.

Legislative Update

It has been a very active year for pension legislation, especially in Western Canada. Further legislative and regulatory changes are in process at both the federal and provincial levels. This session will focus on the most relevant changes to date as well as proposed legislation and what we can expect to see in the coming year.

Speaker: Murray Gold

Managing Partner
Koskie Minsky LLP
Toronto, Ontario

5:00-6:00 p.m.

Welcome Reception—Fairmont

Guests welcome

FRIDAY, MAY 8

7:30 a.m.-12:00 noon

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Privacy Law: Social Media, CASL and More

This session will provide a practical overview of privacy law and how it applies to trustees and professional advisors of pensions and benefits providers. The legal landscape related to social media and CASL will also be reviewed. Learn more about steps you should (and shouldn't) be taking to stay on the right side of your privacy obligations.

Speaker: Andrew Buck

Associate
Pitblado LLP
Winnipeg, Manitoba

FRIDAY, MAY 8 (CONT.)

9:45-10:45 a.m.

EAPs: Recent Developments and Ethical/Legal Considerations

As new technologies emerge in the delivery of mental health services, legal and ethical factors that govern the field need to be revisited. Issues relating to privacy and confidentiality, training and best practices, and access to treatment and accommodation require consideration when using new treatment modalities.

Speaker: Ian Altman

Executive Director of EAP Services
Manitoba Blue Cross
Winnipeg, Manitoba

11:00 a.m.-12:00 noon

Compensation for Employers of Reservists Program (CERP)

The Compensation for Employers of Reservists Program (CERP) will provide financial support to employers of reservists who deploy on operations and will help minimize the disruptions to employer businesses. This session will focus on the background and structure of the program, including:

- Employer support and engagement—history and mandate of the Canadian Forces Liaison Council and its role in delivering employer support programs, including CERP
- Description of program delivery regime—a jointly delivered program by the Department of National Defence (DND) and Employment and Social Development Canada (ESDC)
- Eligibility criteria and thresholds
- Payment scheme
- Potential implications to multiemployer and public sectors.

Speaker: Derek Cheff

Chief of Staff, Lieutenant-Colonel
Canadian Forces Liaison Council (CFLC)
Department of National Defence
Ottawa, Ontario

Visit www.ifebp.org/canupdate for updates.

CONTINUING EDUCATION CREDIT

Programs sponsored by the International Foundation of Employee Benefit Plans are consistently accepted for credit by agencies governing continuing education for license renewal and professional recertification. Please note that preapproval by the governing agency is sometimes necessary. It is important therefore to register at least 45 days prior to the program taking place.

The Canadian Public Sector Pensions and Benefits Conference as well as the Canadian Legal and Legislative Update have been submitted to the Registered Insurance Brokers of Ontario (RIBO) for continuing education (CE) credit.

Note: Requests made for continuing education credit do not guarantee administration of credit.

For further information on continuing education credit, please call (262) 786-6710, option 2.



Educational sessions at this program may qualify for CEBS continuing professional education (CPE) credit. For CPE inquiries, please contact the CEBS Customer Service Department at (800) 449-2327, option 3, or e-mail cebscpe@ifebp.org.

REGISTRATION POLICIES

- See our policies regarding your registration/cancellation/refund/record retention/photo release and privacy at www.ifebp.org/policies.
- Cancellation/transfer requests must be in writing and are subject to a fee of \$50 per meeting day for cancellations and \$50 for transfers.
- Administrative fee for cancellation received within 30 days of meeting is 50% of the registration fee.
- Cancellations received on or after the opening day of a program are subject to forfeiture of all registration fees.

For more information regarding administrative policies such as complaint and refund, please contact Registrations at (262) 786-6710, option 2, or edreg@ifebp.org.

SPONSORSHIP INFORMATION

Sponsorship opportunities are available for these conferences. For more information, please contact Sandra Lange at (262) 373-7657 or sandral@ifebp.org.

RELATED READING

Canadian Pensions and Retirement Income Planning

Towers Watson

A comprehensive look at Canada's tax rules for retirement income programs that covers all types of plans including defined benefit, defined contribution, RRSPs and deferred profit-sharing plans. Appropriate for plan sponsors and those who provide support to pension plans, this book includes:

- Details on registration rules
- Guidance on determining pension adjustments and reversals
- Updated information on Registered Plan Directorate policies
- Updated forms and filing requirements
- Charts of relevant and commonly used reference data including CPP/QPP/YMPE, average wage, interest rates and relevant Income Tax Act limits.

2013. CCH Canadian Limited. Item #8991.

\$157 (I.F./ISCEBS Members: \$147). (Price includes shipping and handling.)

www.ifebp.org/books.asp?8991



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Canadian Public Sector Pensions and Benefits Conference REGISTRATION/2015 Canadian Legal and Legislative Update

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 Title _____
 Address _____ Business Home
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I give consent to receive future e-mail communications from the International Foundation.

Last 4/3 digits of SSN/SIN _____ Date of birth (mm/dd/yyyy) _____

See policies regarding registration/cancellation/refund/record retention/photo release and privacy at www.ifebp.org/policies.


NOT A MEMBER? JOIN NOW AND SAVE!

Individual C\$295* Organizational C\$865* Join now and pay the lower member rate.

*Membership dues are reduced quarterly. Visit www.ifebp.org/join for current rates.

REGISTRATION INFORMATION

Organization representing _____
 Organization # _____
 Badge name _____ Badge title _____
 Special dietary requirements—specify _____
 Form completed by _____ Phone _____

 Special assistance?
 Yes No

Attend Both Programs for One Low Price* (Save C\$250)

Canadian Public Sector Pensions and Benefits Conference

and Canadian Legal and Legislative Update

Until March 26

After March 26

May 5-8, 2015 • Winnipeg, Manitoba

Member fee.....	<input type="checkbox"/> C\$1,990	<input type="checkbox"/> C\$2,490	Public15
Nonmember fee.....	<input type="checkbox"/> C\$2,390	<input type="checkbox"/> C\$2,890	Public15

***Canadian Public Sector Pensions and Benefits Conference • May 5-6 (60-1567)**

Member fee.....	<input type="checkbox"/> C\$1,185	<input type="checkbox"/> C\$1,435
Nonmember fee.....	<input type="checkbox"/> C\$1,385	<input type="checkbox"/> C\$1,635

***Canadian Legal and Legislative Update • May 7-8 (60-1560)**

Member fee.....	<input type="checkbox"/> C\$1,055	<input type="checkbox"/> C\$1,305
Nonmember fee.....	<input type="checkbox"/> C\$1,255	<input type="checkbox"/> C\$1,505

Museum Reception (complimentary)

Wednesday, May 6, 5:00-7:00 p.m.

I will attend I will attend with a guest I will not attend

2015 Policy: Early cancel fee is C\$50/meeting day. Within 30 days of meeting, cancel fee is 50% of registration fee.

HOTEL

Reservation Deadline: April 6, 2015 Include C\$350 hotel deposit

Fairmont Winnipeg C\$239 Single/Double

of Adults _____ # of Children _____ King bed Two beds

Arrival date _____ Departure date _____ Special requests—describe _____

 **SMOKE-FREE PROPERTY**

RELATED READING

Canadian Pensions and Retirement Income Planning Item #8991 C\$157 (I.F./ISCEBS Members: C\$147)
 (Book price includes shipping and handling.) Additional information at www.ifebp.org/bookstore.

CONTINUING EDUCATION CREDIT

\$25 continuing education service charge due at time of registration (if applicable). The International Foundation will apply for CE credit based on requests. You must indicate the profession for which credit is requested.

Insurance agent* **Lawyer** **Other, specify** _____

Licensed in the province of _____

License # _____

*Please plan accordingly: Alberta requires the International Foundation to submit sessions for review 15 days prior to program taking place.

Note: Requests made for CE credit on this form do not guarantee administration of credit.

CEBS CPE Continuing education forms are not required to earn CEBS CPE credit. By checking this box you will be provided with continuing education forms in your registration packet. These forms can be turned in at the program for a CPE certificate for documentation and to assist you with self-reporting your CEBS CPE credits. **\$25 CE fee does not apply.** Visit www.cebscpe.org for additional information on reporting CEBS CPE credit hours.

PAYMENT INFORMATION

Full payment in Canadian funds must accompany order.

Make cheque payable to International Foundation.

Exempt from tax. For meetings held in Canada, attach exemption certificate.

VISA MasterCard Discover

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Credit card # _____

Exp. date _____

Cardholder's name (print) _____

REGISTRATION/ORDER SUMMARY

Registration fee	\$ _____
Book(s)	\$ _____
Subtotal (taxable)	\$ _____
GST (5%)	\$ _____
Membership fee	\$ _____
Hotel deposit (\$350)	\$ _____
CE service charge (\$25)	\$ _____
Total (Canadian funds)	\$ _____



Register online at www.ifebp.ca



Mail the registration form with cheque or credit card number to: International Foundation—Conference, P.O. Box 2406, Station A, Toronto, ON M5W 2K6



Fax your registration with credit card number: (262) 364-1818



For registration information, e-mail edreg@ifebp.org, or phone (905) 361-2822 or toll-free (844) 809-2698.

