

2009 CPBI Ontario Regional Conference Speakers

October 5 – 7, 2009

Blue Mountain Resort & Conference Centre, Collingwood, ON

Rory Albert Plenary III – Managing Pension Investment Risk



Rory Judd Albert, the former Co-Chair of Proskauer's 150-lawyer Labor and Employment Department, is the Chair of its 60-lawyer Employee Benefits and Executive Compensation Group ("EBEC Group"). Rory recently completed his second three-year term as an elected member of Proskauer's seven-partner Executive Committee, and he now serves as the Chair of the Firm's Advisory Committee (which is composed of all of the Firm's Department Chairs and Office Heads).

Although Rory has been widely recognized as a driving force within the employee benefits legal community during the past quarter-century, he recently garnered several prestigious accolades in this area, including receiving for the past several years a coveted "Second Tier" ranking from **Chambers USA**, which has described him as "truly a trailblazer" and as "a bright intellectual who offers practicality to his clients, all of whom benefit from his excellent judgment." In the 2008 edition of **Chambers USA**, clients commented to its editors that Rory possesses a "great breadth of knowledge and is adept at handling complex situations where competing viewpoints need reconciling." The EBEC Group also garnered a "Second Band" ranking by **Chambers**, which praises the Group as having "deep expertise" in employee benefits and as "a great resource to bounce ideas off, with a great talent base of extremely knowledgeable, responsive and no-nonsense lawyers."

Rory was elected one of the "Top 40 Employee Benefit Law Attorneys" in the nation in a survey conducted by **The National Law Journal**; was named by **New York Magazine** as among the "Top 50" attorneys in New York State; and by **HR Executive Magazine** as one of the "Top 50" employment attorneys in America. He has also been named several years in a row by **Super Lawyer Magazine** as a New York "Super Lawyer" and by the **Lawdragon 500 Guide** as one of the "500 Leading Lawyers" in the nation; is highly-recommended for "Employee Benefits and Pensions" by **PLC Which Lawyer?**, and is listed in the **Guide to the World's Leading Labour and Employment Lawyers, U.S. Legal 500** and **Best Lawyers in America**.

Rory also has been elected a fellow of the American College of Employee Benefits Counsel and a member of the International Foundation of Employee Benefit Plans, as well as a faculty member of the Law Education Institute.

Craig Alexander Feature Presentation – Canadian Economic Overview



Craig Alexander holds a Master's degree in economics from the University of Toronto. He has more than ten years of experience in conducting economic analysis in the financial industry. Prior to joining the private sector, Craig spent four years as an economist at Statistics Canada.

In November 2004, Craig was promoted to Vice President and Deputy Chief Economist for TD Bank Financial Group. In his current role, he travels across Canada, speaking to TD clients and various business groups about economic trends and prospects. He is frequently quoted by the media on economic issues and writes reports on a wide array of economic and financial subjects. In addition to his role at TD Bank, Craig is also the current President of the Canadian Association for Business Economics.

Keri Alletson Benefits workshop 1E – Linking Wellness and Business Success



Keri Alletson is Towers Perrin's Canadian Director of Research and Development, based in the firm's Toronto office. Keri plays a key role in Towers Perrin's research initiatives aimed at helping organizations maximize their employee engagement, wellbeing and business performance.

In addition to her regional responsibilities, Keri also plays a significant role in Towers Perrin's global workforce effectiveness group. This team deploys consultants with in-depth subject matter expertise to design and implement workforce effectiveness strategies with clients, linking their HR programs with business plans and goals. Keri has worked with some of Canada's largest organizations in a wide variety of industries. She is a published author on workforce effectiveness, and frequently speaks to management groups on workforce issues.

Gwen Barrett Pension Workshop 1F – Top 5 Pitfalls in Pension Plan Administration



Gwen Barrett is a Pension Administration Consultant with Watson Wyatt Worldwide. Her areas of expertise include: all aspects of pension administration consulting, including service delivery for all plan types and sourcing arrangements; diverse aspects of pensions and benefits, with a primary focus on recordkeeping and compliance with federal and provincial regulations; and administration audits, transition planning and delivery for new clients and those undergoing system implementations or conversions.

Gwen Barrett has more than 25 years of experience in the pension administration and consulting industries. She is responsible for Watson Wyatt's relationship with major pension administration clients, including US-based and UK-based companies with Canadian operations and is the administration solution leader for Watson Wyatt's retirement practice in Canada.

Randy Bauslaugh Pension Workshop 1F – Top 5 Pitfalls in Pension Plan Administration



Randy Bauslaugh's practice relates exclusively to pensions, benefits, executive compensation and related investment arrangements. He has been involved in numerous pension plan restructurings, wind-ups and surplus distributions. His clients include corporations, boards of trustees of multi-employer plans, individuals and domestic and foreign governments.

Randy has chaired or contributed significantly to many Canadian and international professional organizations in the legal, actuarial, pension and asset management field. He has frequently taught, written and spoken on pensions and employee benefit matters. Randy is a member of the MEPP (multi-employer pension plan) Consultation Committee of the Financial Services Commission of Ontario, the Steering Committee of the International Pension and Employee Benefits Lawyers Association and a member of the editorial advisory board of *Benefits and Pensions Monitor*. He is a member of the Ontario March of Dimes Employee Benefits Committee. Randy is a past president and member of the board of directors of Theatre Direct Canada, Canada's leading theatre for young minds.

Randy is listed in the *Canadian Who's Who*, and cited in *Chambers Global: The World's Leading Lawyers for Business 2008*, *The 2008 Lexpert/American Lawyer Guide to the Leading 500 Lawyers in Canada*, and *The Best Lawyers in Canada 2008* in the area of pensions and benefits law. He is also cited in *The Canadian Lexpert Legal Directory 2008* as a "most frequently recommended" practitioner in pensions and employee benefits and in the *Federated Press Directory of Professionals* as a "distinguished contributor." He enjoys the highest rating granted to lawyers for professional competence and integrity in the *Martindale-Hubbell* legal directory.

Mary Ann Baynes Small Business Workshop 2D – Group Benefits: Managing Risk for the Small Employer

Mary Ann has a diverse background within group benefits business development and leadership, developed over her 25 years in the industry. She was a benefits consultant in the Toronto market before joining Sun Life in 2004, where she has held senior leadership roles within Business Development. Mary Ann's mandate as AVP SunAdvantage is setting the strategic direction of Sun Life's small business market segment for groups with 3 to 75 employees, including product line, underwriting, administration, marketing, and the sales and service teams across Canada.

Dino Bourdos Investment Workshop 1C – Alternative Investments: A Practical Guide

Dino joined TD Asset Management Inc. in February 2000. At TDAM, he is responsible for managing and trading derivatives-based strategies, including a variety of equity, fixed income and currency overlay mandates. Dino is also co-head of product specialist team and is specifically responsible for developing and

marketing portable alpha and derivatives-based strategies. In this capacity he works closely with existing and prospective clients to provide solutions for managing overall portfolio, market and currency exposures. Prior to joining TDAM, Dino was an analyst and trader with Canada Trust Investment Management Group Inc. At CT IMG, his responsibilities included analyzing and trading derivatives, fixed income and currency products. He was awarded the CFA designation in 1998, completed the Chartered Market Technicians (CMT) program in 2001 and completed the first level of the Chartered Alternative Investment Analyst (CAIA) Program in 2008. He obtained his undergraduate degree in Economics from the University of Toronto in 1994. Currently, Dino is the Programs Chair of the Toronto CFA Society.

Elizabeth Brown Plenary III – Managing Pension Investment Risk



Elizabeth Brown, a Partner in Hicks Morley Hamilton Stewart Storie LLP., heads up the firm's Pension and Benefits practice group. Elizabeth is also a member of the Firm's five member Executive Committee. Prior to joining Hicks Morley in 1995, Elizabeth was a pension lawyer with Hewitt Associates and prior to that practised civil litigation with a national full services law firm in Toronto. Listed in the 2007 and 2009 Canadian Legal Lexpert Directory® as "repeatedly recommended" in the area of pensions and benefits and was named as "Leaders in their Field" in Chambers Global 2009 as an Employment, Labour and Pensions Lawyer (Pensions & Benefits Canada).

David Charbonneau Small Business Workshop 1H – CAPs for Small Business

Mr. Charbonneau is responsible for developing and implementing strategies aimed at promoting Group Retirement Savings business and ensuring its growth in the consulting market across Canada. Mr. Charbonneau has a Bachelor of Science specializing in Mathematics from Université de Montréal and holds the professional designation of Associate of the Society of Actuaries (ASA). He is also a member of the Canadian Pension & Benefits Institute (CPBI). Prior to joining Desjardins Financial Security in 2007, Mr. Charbonneau worked for over two decades with major consulting actuarial firms in the field of pension plans.

Tim Clarke Benefits Workshop 2A – Retiree Benefits Grow Up



Tim leads Hewitt Associates' Benefits practice in Canada, working out of Toronto. He is responsible for helping to develop and implement the business strategy for the practice, creating health and benefit plan solutions for Canadian employers that achieve business objectives. He has been with Hewitt for 15 years.

Tim works with clients across Canada on a variety of group benefits and actuarial projects, including the development of health care, wellness, and prescription drug strategies, as well as employee and retiree plan designs and pricing strategies, claims analyses, vendor management, and postretirement benefit valuations.

Tim is a Fellow of the Canadian Institute of Actuaries, is a Fellow of the Society of Actuaries, and is a member of the Canadian Institute of Actuaries' Health Care Practice Committee. He holds a Bachelor of Mathematics degree in Actuarial Science and Economics from the University of Waterloo.

Michael "Pinball" Clemons Tuesday Lunch - All Heart



Michael "Pinball" Clemons -- the CEO of the Toronto Argonauts - is a national icon of sporting excellence, community leadership and personal character and integrity. He's considered to be one of the most likable, respected (and of course, talented) individuals to ever put on a sports jersey in this country. But his legacy may well lie with the thousands of people he has inspired, both on and off the field.

Clemons stands only 5 feet 6 inches and 170 pounds. Despite this -- because of this -- he has led a spectacular twenty-year pro football career, setting CFL records and winning Grey Cups with the Argonauts, as both a player and their head coach. He is now their CEO. His thoughts on his new role encapsulate perfectly the powerful message about perseverance, commitment and leadership he shares with audiences across Canada. "It is now my job to continue to give direction and vision to this organization. Vision without action is dangerous; action without vision is a nightmare. What you want to do is be able to put vision into action. My job is to provide the vision."

Michael "Pinball" Clemons exhibits a commitment to community --especially to youth -- that is unparalleled in Canada. One of his latest projects is the "Stop the Violence" campaign, which encourages grassroots support, business sponsorship and the active participation of communities, schools and government in educating youth and curbing increasing gun violence in the Toronto area.

Patricia Croft Feature Presentation – Canadian Economic Overview



Patti joined Phillips, Hager and North in 2004. She was appointed chief economist of RBC Global Asset Management in late 2008 and is part of the four-person asset mix team that manages the asset mix for \$25 billion in balanced fund mandates for PH&N. She is also a member of the RBC Investment Strategy Committee; the group responsible for global asset mix recommendations for use in RBC Asset Management's key client groups. Patti has 29 years of investment experience, including positions as economist at two major investment dealers, chief economist of a major Canadian financial institution and asset mix chairperson and chief economist for six years at a leading Canadian money management firm. Patti is a graduate of the University of Toronto. She is a past board member of the International Foundation for Employee Benefit Plans and Women in Capital Markets. Patti is also a spokesperson for the firm appearing frequently in the media, on television, radio and in the press, commenting on economic and capital market developments.

**Mark Dowdell Small Business Workshop 1H – CAPs for Small Business
Investments Workshop 2C – Default Options: What do they mean
for your plan?**



Mark Dowdell, CFA, Vice President & COO, Retirement & Investment Services, Pal Benefits Inc., began his career over 17 years ago at a major Canadian insurer where he specialized in two critical areas: Business development and client management in the group retirement marketplace. Subsequently, at a leading Canadian investment counsel firm, Mr. Dowdell expanded on these specialties with high net worth individual client families.

At Pal Benefits Inc., Mr. Dowdell oversees all aspects of the Retirement & Investment Services Business Unit. In addition, he provides consulting services – including investment manager search and selection – for Defined Benefit and Defined Contribution Pension Plans, Deferred Profit Sharing and Group Registered Retirement Savings Plans. In the current climate of corporate governance, Mr. Dowdell assists clients in understanding and addressing their CAP governance responsibilities.

Mr. Dowdell has participated as a Jury member for the Canadian Investment Awards, Pooled Fund Category, since 2005.

Lynda Ellis Pensions Workshop 1F – Top 5 Pitfalls in Pension Plan Administration

Dr. Denise Fairhurst Benefits Workshop 1E – Linking Wellness and Business Success

Dr. Denise Fairhurst is a Senior Consultant with Towers Perrin's Organizational Surveys and Insights practice, based in the firm's New York office. She works with multinational employers on employee engagement, company culture and climate assessments, M&A monitor surveys, internal and external customer satisfaction, linkage analysis and the customer service profit chain, employee well-being, and safety and process safety culture assessments.

Denise has 11 years of professional experience in applied customer research, employee research and consulting. She has worked as the lead consultant across a wide range of industries including hospitality, media, retail, FMCGs, high tech, financial services, telecommunications and public services.

Denise started her career in the U.K. and has spent the last four years with Towers Perrin in Singapore. She has extensive experience working with large international companies both across Asia and around the globe.

Denise is on the Towers Perrin Engagement and Well-being Thought Leadership Team. She specializes in employee engagement, employee safety and employee well-being, linking company culture to optimizing business performance.

Denise has authored numerous papers and is a frequent speaker at conferences on the topic of Employee Engagement. Her most recent conference presentation was for the Singapore Government's Human Capital Summit, on Engaging, Motivating and Retaining Women in the Workforce. She has also recently authored a paper, "Attracting, Retaining and Motivating Gen Y," which was presented at the SHRI annual conference.

Denise received her Ph.D. in psychology from the University of Leeds in the U.K.

Barry Glaspell Pensions Workshop 2B – How to Avoid Ending Up in Court



Barry Glaspell is a litigation partner at Borden, Ladner and Gervais. Barry graduated from the University of Toronto (B. Com. 1981, LL.B. 1984), Harvard Law School (LL.M. 1985) and Trinity College, University of Cambridge (LL.M. Int. Law 1986). He clerked with Justice W. Z. ("Bud") Estey of the Supreme Court of Canada. Barry has been with the firm since called to the Ontario Bar in 1991.

Barry is adjunct Professor of Law at the University of Toronto Faculty of Law and at the University of Ottawa, Common Law. Barry is teaching the 2007-2008 Private International Law courses at each law school.

Barry specializes in class actions. Since being co-counsel on the first Canadian multi-provincial class action settlement (*i.e.*, breast implants), Barry has spoken widely and presented numerous papers on class action issues

Barry's experience includes as counsel to:

- *Ontario Colleges* responding to student claims re ancillary fees
- *Purdue Pharma* defending Canadian OxyContin claims
- *Carrier Corporation* defending claims re hi-efficiency furnaces
- *Ridley Inc.* defending BSE economic loss claims arising from 2003 closure of U.S. border to Canadian cattle and beef
- *Lakeridge Hospital* defending class actions arising from reporting of infectious disease
- *Bank of Canada* responding to allegations re pension plan administrative expenses
- *Global Minerals & Metals* defending claim by copper purchasers alleging conspiracy to inflate London Metals Exchange prices
- *Hamilton Health Sciences Centre* defending TMJ class action
- *Bristol Myers Squibb* on Canadian breast implant litigation / settlement
- *BPB Canada* on class proceeding to withdraw surplus from pension plan
- *Sunnybrook Hospital and Cancer Care Ontario* regarding immunity from retail sales tax

Duane Green Investments Workshop 2C – Default Options: What Do They Mean For You



Duane W. Green, Senior Vice President, Institutional Investment Services, joined Franklin Templeton Investments in 2004. Mr. Green is responsible for overseeing Franklin Templeton Investments' Canadian

institutional business which represents in excess of \$20 billion in assets, and services a growing base of over 250 institutional clients. Prior to joining Franklin Templeton Investments, Mr. Green was avice president with an international insurer. Previous to this role, he was responsible for the servicing and distribution of investment products for a large Canadian insurer. He has over 14 years' experience in the financial services industry and has had exposure to sales, marketing and relationship management of both risk and asset products. Mr. Green has a degree in economics from the University of Ottawa and holds the FMA, CIM and FCSI designations.

Pamela Hooke Benefits Workshop 1A – The New World of Flex Work

Greg Hurst Pensions Workshop 1B – CAP administration and Design



Greg has 26 years experience in providing pension consulting services to a wide variety of corporate, union, government clients, financial institutions and legal firms. He has responsibilities for clients across Canada, and the Canadian operations of U.S. clients, that range from dozens to thousands of plan members. His approach to complex pension matters is very entrepreneurial, creative and innovative.

Greg has achieved national recognition as one of Canada's leading pension experts. He is frequently quoted in the popular press and benefits industry publications on pension matters. Greg has authored dozens of pension-related articles which have appeared in Benefits Canada magazine, Benefits and Pension Monitor magazine and the commentary pages of the Financial Post. He is also a member of the editorial advisory board of Benefits Canada magazine. Greg is also frequently engaged as a speaker on retirement topics.

Ari Kaplan Pensions Workshop 2B - How to Avoid Ending Up in Court



Ari Kaplan is a partner at **Koskie Minsky LLP** and is recognized as a leading practitioner in the area of pensions and employee benefits by both the Canadian Legal Lexpert Directory and Best Lawyers in Canada. His clients include trustees of multi-employer pension plans, employee and pensioner groups, private and public sector trade unions and individuals. Ari's practice has a litigation focus with an emphasis on pension trust, surplus and wind up matters; administrative law and class proceedings involving pension rights; spousal pension and marriage breakdown entitlements; plan governance and regulatory compliance. Ari appears regularly before the Ontario Superior Court, Divisional Court and the Financial Services Tribunal and has appeared as counsel before the Federal Court of Canada, the Ontario Court of Appeal and Supreme Court of Canada.

Ari is the author of the book *Pension Law* (Toronto: Irwin Law, 2006), winner of the 2007 Walter Owen Book Prize, which is presented by the Foundation for Legal Research for excellence in legal writing and to reward outstanding new contributions to Canadian legal literature. His comprehensive study of Canadian

pension law and regulation has been cited as an authority by the Supreme Court of Canada and other appellate courts and tribunals, and appears in law libraries across the country and internationally.

Ari holds an LL.M. in administrative law, is an Adjunct Professor at the University of Toronto and an Assistant Professor at the University of Western Ontario and teaches courses in pension law at both institutions. Ari also teaches at Osgoode Hall Law School's Essential Course on Pensions.

Ari writes and speaks regularly for pension-industry publications and organizations, including Benefits Canada, Employee Benefits News Canada and the Canadian Pension and Benefits Institute. Ari is the editor-in-chief of the bimonthly Canadian Legal & Legislative Reporter and a contributing author to Employee Benefits in Canada (Third Edition Revised), both published by the International Foundation of Employee Benefit Plans (IFEBP), and is part of the IFEBP teaching staff.

Ari sits on the executive of the pension and benefits section of the Ontario Bar Association, and also sits on the Boards of Directors of Hillel of Greater Toronto and Associated Hebrew Schools of Toronto and is a past-president of the Canadian Jewish Law Students' Association

Peter Klein Investments Workshop 1B – Understanding Leverage and Risk



Dr. Peter Klein is a professor of finance. Prior to joining SFU Business, he spent 10 years in a variety of senior roles at CIBC/Wood Gundy Financial Products, including chief trader for capital markets in London, UK and vice-president of investment banking in Tokyo. He then made a career switch, earning his PhD in finance from the University of Toronto in 1996 before arriving at SFU. In 1998, he received SFU Business' highest teaching honour, the Canada Trust Distinguished Teaching Award. Peter was the founding academic director of the faculty's Global Asset and Wealth Management MBA and continues to teach in this program.

A former trustee of the SFU academic pension plan, Peter is also a Chartered Financial Analyst, Chartered Business Valuator, Certified General Accountant and was previously director of professional development for the Vancouver Society of Financial Analysts.

Peter focuses his research on return anomalies, taxation, credit risk, derivative securities and corporate governance and has published in a number of leading academic journals, including the Journal of Financial Economics, the Journal of Public Economics and the Journal of Banking and Finance.

Peter enjoys skiing, backpacking, surfing and paddling in BC's great outdoors with his family and friends.

Amber MacArthur Plenary I – Hiring and Hanging onto GenY



Amber MacArthur is a young, bright and deeply credentialed Web consultant -- a leading voice of the social media generation. Amber Mac -- as she's known to her legion of fans -- is also a pioneering and wildly popular web journalist who interviews the Web's users, content producers and entrepreneurs. In podcasts and on television (she has worked for the CBC, CityTV and G4TechTV), she traces the profound impact of emerging technologies on the way we live, work and play -- and she makes it all fun, informative and accessible. Currently, MacArthur is the co-founder of both MGI Media and Arktyp, and a lead consultant for Tony Robbins on his new social networking site.

Previously, she was a key strategist for the world-famous Razorfish, in San Francisco, and has worked on projects for Microsoft, Adobe, HP and Bell. MacArthur also hosts the podcasts Inside the Net, commandN, and Webnation, which won the 2007 iTunes Top New Podcast. She is also actively involved in Women in Technology International.

Barry Noble Conference Opening

Pensions Workshop 1B – CAP Administration and Design

Vice President, Distribution, Group Savings & Retirement Solutions (GSRS)

Barry has over 25 years experience in the Group Insurance Industry and joined Manulife in 1995 from North American Life. Previous roles within Manulife include Regional Vice President, Ontario (GSRS); Regional Vice President, Toronto Victoria Park Office (Group Benefits); National Director, Managed Care (Group Benefits); and National Sales Manager, Manuscript (Group Benefits). While with North American Life, Barry spent 12 years with distribution management responsibilities in the Group Pension and Group Life & Health Markets.

Barry is a current or past member of a number of industry committees including GRMA (Group Retirement Marketers Association), CPBI (Canadian Pensions & Benefits Institute), CLHIA Market Conduct Task Force, CALU Group & Pension Committee, ECHCO (Employer Committee on Health Care – Ontario), CCIH (Canadian Council on Integrated Healthcare), and GIPC (Group Insurance Pharmaceutical Committee). Barry has also held advisory board positions on a number of industry publications and was the 2002 recipient of Canadian Healthcare Manager's *Who's Who is Healthcare Award*.

Patricia Perez-Coutts Plenary II – The New Frontier



Patricia Perez-Coutts joined AGF in 2001 as an emerging markets specialist. She was named Portfolio Manager of AGF Latin America Fund in 2001 and AGF India Fund in 2002. Both funds were later merged into AGF Emerging Markets Fund, which Patricia has managed since June 2002. The Fund won the Emerging Markets Equity Fund Award at the 2005, 2006 and 2007 Canadian Investment Awards.

She continues to contribute investment ideas in emerging markets for AGF Global Equity Fund and AGF World Companies Fund.

Patricia began her career in 1986 as an economist for Peru's Institute of Foreign Trade. In 1990, she joined First Mercantile Corporation as vice-president of research, coordinating research to create private investment vehicles for high-net-worth clients. In 1994, she joined AIM Trimark Investments as vice-president and portfolio manager, where she co-managed a \$250 million mutual fund and built considerable expertise in the Latin America region.

Patricia graduated from Pontificia Universidad Catolica del Peru with an Honours BA in Economics. She earned a BA in Mathematics for Commerce at York University. She is a member of the Toronto CFA Society.

Paul Pittman Small Business Workshop 1D- Executive Retirement Arrangements for the Small Business



Is the founder of The Human Well, a collaborative human capital consulting group specializing in partnering with organizations in transition and Managing Director of Swann Global Americas and head of global consulting.

Paul has more than 25 years international experience including heading the Canadian human capital consulting practice of Andersen/Deloitte and global HR roles at Alcan and Japan Tobacco International (formerly RJR Nabisco).

He has consulted to many of Canada's largest Corporations.

His experience includes designing and implementing global reward systems, cultural change, global pension and employee benefit structures and mobile talent management strategies. He also works with Boards on executive compensation and executive transition.

He led the HR teams in the \$8 billion acquisition of RJR Nabisco by Japan Tobacco in 55 countries and the \$12 billion spin off of the SEC quoted Novelis in 16 countries. He has led major organizational rationalization projects including world-wide HR and shared service functionality.

He founded The Human Well in 2004 and in 2006 became a founding shareholder of Swann Global in Canada; an executive search and consulting firm specializing in the mining sector. He conducts major search assignments and consults on international HR matters, improving the ROI on investment in people.

He is a former member of the Conference Board of Canada's Council of Human Resources Executives and speaks regularly at conferences globally.

He has lived in the UK, Canada (Quebec and Ontario) and Switzerland and worked in many other parts of the world. He is an accountant by training.

John Richards Small Business Workshop 1d – Executive Retirement Arrangements for the Small Employer

Oma Sharma Pensions Workshop 1B – Administration and Design



Oma Sharma is a National Partner in the Mercer Toronto office. Oma is a member of the Canadian Investment Business Leadership Group, which is responsible for the strategic direction of the business. She is also one of Mercer's Global DC Leaders and chairs the cross-business leadership group responsible for Mercer's DC Consulting Services in Canada.

Oma's main practice area is the design, implementation and ongoing monitoring of defined contribution (DC) plans. She has extensive experience in designing and benchmarking DC plans, conducting investment manager and recordkeeper searches, and developing appropriate governance and investment structures for these plans. Oma also assists clients in conducting periodic investment manager and recordkeeper performance reviews for these plans.

Oma has been with Mercer since 1987. Prior to joining Mercer, she spent two years with a major insurance company where she was involved in the design and administration of defined benefit pension plans.

Oma holds a Bachelor of Commerce and Finance (BComm) degree from the University of Toronto and is both a CFA Charterholder and a Fellow of the Life Management Institute (FLMI).

Nora Spinks Benefits Workshop 1A – The New World of FLEX Work



NORA SPINKS, is the President of Work-Life Harmony Enterprises, an international research and consulting firm based in Toronto, Canada. For more than 20 years, Nora has worked with progressive organizations, helping business, labour, government and community leaders to create effective, productive and supportive work environments; strengthen families; and build healthy communities.

A renowned speaker, author and recognized thought leader, Nora has provided strong leadership in the work-life field across Canada and around the world. Building on experience, staying current and analyzing trends, Nora has added tremendous value to work-life and wellness committees, executive teams, human resource professionals and practitioners, board of directors and research organizations.

David Stamp Pensions Workshop 2B – How to Avoid Ending up in Court



David is a partner in the Litigation Department in the firm's Toronto office. He is also cross-appointed as a partner in the firm's Pensions and Benefits Department. David specializes in pensions litigation, employment litigation and general corporate and commercial litigation.

He represents major Ontario pension funds and corporations in various pensions litigation matters, including appearing on numerous pensions litigation cases at the Ontario Court of Appeal. This practice also includes a substantial administrative law component, both advising and appearing before statutory tribunals. He also represents corporations defending wrongful dismissal and other employment-related lawsuits, and he is the leader of the employment litigation sub-group in the Toronto Litigation Department.

His corporate and commercial litigation includes representing national and international corporations in commercial disputes either in court or in mediation/arbitration. This practice includes litigation relating to corporate acquisitions, and David has acted as counsel in a leading case addressing the duties of a Board of Directors and controlling shareholders in the context of a take-over bid.

Jeffrey Stinchcombe Small Business Workshop 2D – Group Benefits: Managing Risk for the Small Employer



Jeffrey Stinchcombe, is a Partner with HealthSource Plus, responsible for corporate development where he focuses on benefits consulting to employer groups between 50 to 5,000 employees. Jeffrey is an accredited instructor at the HRP, BHRMA and HRMAM in the Best Practices of the employee benefits industry. Jeffrey sits on the Editorial Advisory Board of Employee Benefits News Canada. His columns can be found in Employee Benefits News Canada, Benefits & Pension Monitor and Benefits Canada. Jeffrey earned his BA at the University of Western Ontario, a Diploma in Law and Security Administration, and holds a certificate in negotiation from Harvard Negotiation Project.

Rose Vieira Pensions Workshop 1F – Top 5 Pitfalls in Pension Plan Administration

Brian White Investment Workshop 1C – Alternative Investments: A Practical Guide



Brian White is a Vice President and Head of Aon's Toronto Investment Consulting practice. He is a member of Aon's National Practice Council, responsible for the strategic direction and management of the national practice, and a member of Aon's Global Alternative Investment Ratings Committee.

Brian joined Aon in 2005 bringing with him over 18 years of experience in both institutional money management as well as investment consulting. Brian consults to corporations, universities, not for profit organizations and multi-employer sponsors on issues relating to investment and risk management, including asset mix policy, manager structure and selection, alternative investments and performance monitoring.

Brian is a member of the Ontario Regional Council for the Canadian Pension and Benefits Institute. Brian is also a frequent speaker at industry conferences and events. He holds a Bachelor of Administrative and Policy Studies from Trent University, an MBA from the Rotman School of Business at the University of Toronto and a CFA designation from the CFA Institute in Charlottesville, Virginia.