



PENSION BASICS - BEYOND THE BASICS

PENSION BASICS 9 AM to 12 PM

Employer-sponsored Retirement Arrangements

An overview of registered and non-registered plans with a focus on defined contribution vs. defined benefit plans, the pros and cons of a capital accumulation plan, group RRSP's and how they differ from individual RRSP's and other arrangements such as deferred profit sharing plans. Also, find out what options an employee has upon retirement including early retirement options and pension guarantee periods.

Speakers: Lori Satov, Wyatt

Aaron Walker-Duncan, Pension Corporation

Federal & Provincial Regulation of Registered Pension Plans

An overview of the Pension Benefits Standards Act (BC) and the Income Tax Act (Canada) plus other legislation affecting pensions. This presentation covers the history of pensions and pension regulation in Canada as well as the role of the pension plan administrator in ensuring plans are compliant with all standards and legislation.

Speaker: Claude Marchessault, LLB

Government Benefits

A discussion of the Canada Pension Plan, Old Age Security and the Guaranteed Income Supplement, including the background to these government benefits, the contribution eligibility and the portability outside Canada. This presentation will cover whether early retirees with limited employment income can qualify for benefits as well as a review of disability, survivor and death benefits.

Speaker: Service Canada (speakers to be confirmed)

BEYOND THE BASICS 1 PM to 4 PM

Plan Design in Difficult Times

A discussion of some of the available options to plan sponsors given the financial pressures currently facing Canadian pension plans. This presentation will focus on plan design options and on recent legislative and regulatory changes. Case law to help explain the limits on an administrator's ability to amend the terms of the plan will be explored.

Speaker: Lisa Chamzuk, Lawson Lundell

Proactively Protecting Your Plan

When plan changes have to be made to respond to the financial pressure facing the plan, is there anything the administrator can do to better protect the plan from litigation?

A discussion of a variety of strategies for putting the plan in the best possible position to help prevent litigation or to succeed in the event that litigation is commenced. This presentation will provide insight on using the Superintendent's Office to insulate a decision, applying to court for directions in advance of making the decision, and utilizing techniques to try to prevent a class proceeding.

Speaker: Ron Skolrood and Craig Ferris, Lawson Lundell

AGENDA

Date January 20th, 2010
Location Metrotown Holiday Inn Express Burnaby

Date January 21st, 2010
Location Delta Ocean Pointe Victoria

Registration Session 8:30 am to 9 am
9 am to 12 pm
1 pm to 4 pm

EDUCATION COMMITTEE MEMBERS

Committee Chair:
Sinden Malinowski
Manulife Financial

Karen Tomkins
Manulife Financial
Karen Bell

Pacific Blue Cross

Jim Millard
Jennifer Schoenfeld

Hewitt Associates

David Caird

Metro Vancouver

Judy Payne

BC Pension Corp

Sandy Gribbon

BC Pension Corp

PENSION BASICS BEYOND THE BASICS

COURSE REGISTRATION

GST #: 12698893

Please select the date
and location:

January 20th
Burnaby

January 21st
Victoria

Register for one or both sessions. Lunch is included when you register for both sessions

FULL-DAY

- Member: \$325.00 + \$16.25 GST = \$341.25
 Non-Member: \$400.00 + \$20.00 GST = \$420.00

HALF-DAY

Please select either:

Pension Basics Beyond Basics

- Member: \$195.00 + \$11.70 GST = \$206.70
 Non-Member: \$250.00 + \$15.00 GST = \$265.00

ATTENDEE INFORMATION

Membership #

Name

Title

Organization

Address

Email

Phone

PAYMENT INFORMATION

VISA Master Card Amex

Credit Card number

Name on Credit Card

Signature

Expiry Date dd / yyyy

REGISTRATION

NOTES

Cancellations with a full refund are accepted until end of business day on the Friday preceding your course.

Cancellations after this time will be reimbursed 50% of the registration fees.

Substitutions are permitted at any time for no extra fee.

The courses may qualify for recertification for HRMA and PACE designation.

If paying by cheque, please fax your registration form and send cheque in payment for the course to:

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