



CANADIAN PENSION AND BENEFITS INSTITUTE
ONTARIO REGION
APPLICATION FORM

If you are interested in serving on the Ontario Regional Council of the Canadian Pension & Benefits Institute for a **term of three years (2017 – 2020)**, or on a committee of Council for one year, please complete this form and return it, **along with a short resume**, by April 1, 2017 to Christine Lee, CPBI Ontario Region, 1175 Union Ave., Montreal, QC H3B 3C3 Fax: 416-585-3005 or e-mail: (christine@cpbi-icra.ca)

I am interested in volunteering to serve on: (see page 2 for details)	<input type="checkbox"/>	Ontario Regional Council
	<input type="checkbox"/>	A committee of Council – Indicate from the list below
		>
First Name		Name of Employer/Firm/Organization
>		>
Last Name		Title
>		>
E-mail		Address 1
>		>
Phone		Address 2
>		>
Fax		City & Postal Code
>		>

My employer/firm/organization (Select one or more):

Plan Sponsor <input type="checkbox"/>	Consultant <input type="checkbox"/>	Service Provider <input type="checkbox"/>	Other <input type="checkbox"/>
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If Other, provide details.	
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My involvement in the Pension & Benefits industry is primarily in the area of:

Pensions <input type="checkbox"/>	Benefits <input type="checkbox"/>	Pension Investment <input type="checkbox"/>	Other <input type="checkbox"/>
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Signature (is not necessary if returning by email)	Date
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Please note: All applicants will be contacted after April 15, 2017

Please review the attached information about the roles and responsibilities of Council members and committee objectives.

CPBI Mission: To provide CPBI members with the opportunity to participate in high quality, cost-effective education and networking events that focus on the exchange of information and the analysis of the best practices related to pensions, employee benefits and investments, at the national and regional levels across Canada.

CPBI Vision: The CPBI will strive for a strong brand image and to be a well-run organization with unity of purpose and connectivity to its members while offering education and networking programs and services.

CPBI Values: In its governance and programs, CPBI adheres to the following values: – Innovation and quality service to members – Creativity in networking – Results oriented teamwork – Accountability and integrity.

CPBI Ontario Regional Council

CPBI Ontario Regional council is dedicated to organizing and facilitating of premier educational and networking events for pension and benefits professionals across the province. We are focused on offering education and timely information about pensions, benefits and related investments. New members of Council are elected each spring. All members are expected to attend each Council meeting. The schedule is determined at the first meeting of the council year to help avoid scheduling conflicts. In addition, each Council member will sit on one of the committees.

Committees

1. 2018 Regional Conference Committee

The Ontario Region holds an annual conference which offers a wide ranging program of interest to members. The 2018 Conference Committee will begin working on that event immediately following the 2017 conference.

2. Market Development

This committee is responsible for:

- Growing membership (with particular emphasis on plan sponsors);
- Evaluating demographic and other factors that would support the Program Committee's efforts to develop and deliver valuable pension, benefits and investment content that appeals to members and non-members, HR and finance industry professionals and other stakeholders;
- Sourcing/developing technical content for quarterly newsletters; and
- Investigating possible new Chapter locations.

3. Partnerships Committee

This committee has developed a partnership with HRPA and created two Certificate programs: • Benefits Certificate Program – Level 1, 2 and 3 • Pensions Certificate Program – Level 1, 2 and 3. The delivery of these programs is organized through HRPA, with CPBI members offered the HRPA members price. Information about these two programs is on the CPBI and HRPA websites. The Committee also considers promoting industry related non-CPBI educational events, with reciprocal CPBI promotion.

4. Program Committee

This team designs, promotes and executes three signature breakfast seminars:

- Investment Trends
- Benefits Outlook
- Pension Summit

The Program Committee's goal is to deliver interesting and topical presentations to the community, while at the same time ensuring they are financially viable. Additional seminars

may be organized to address topical or special interest issues. The Committee will also review the potential for a charitable event.

7. Sponsorship Committee

This committee is responsible for developing an annual sponsorship program and securing sponsorship revenues to assist in funding the activities of CPBI Ontario. The sponsorships will be offered on an annual basis and provide benefits and profile to those companies which participate in the program, including at the annual CPBI Ontario Conference and at other CPBI Ontario events. Companies will only be asked to participate in one sponsorship program for all CPBI Ontario events. Chapters may still seek sponsorships for local activities. The Chair of the Sponsorship Committee shall serve on the Conference Committee to ensure appropriate liaison.

8. London and Ottawa Chapter Executives

Given the large geographic size of Ontario, members have banded together to establish local Chapters in the London and Ottawa areas. Each Chapter is represented on the Council to ensure effective liaison.