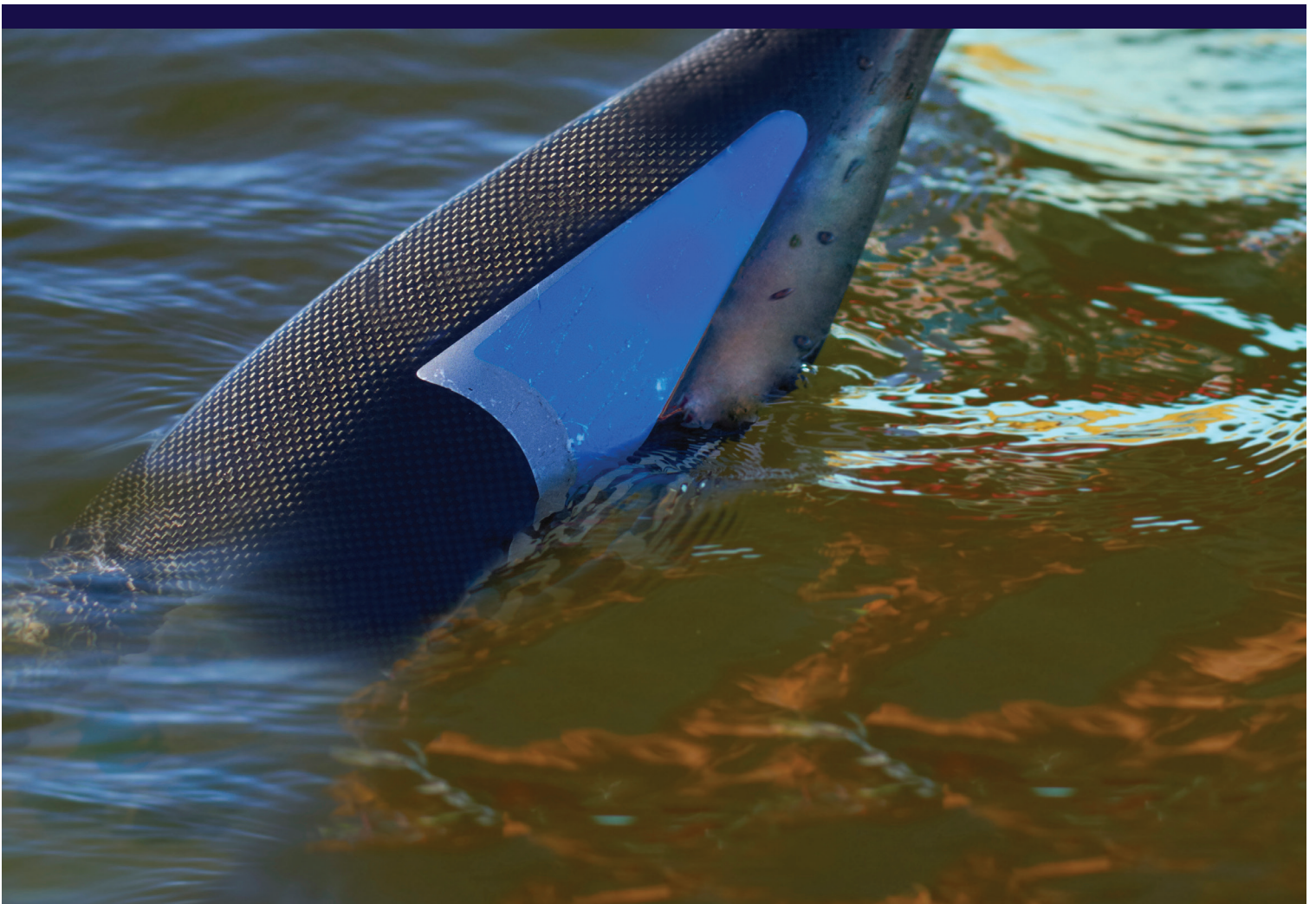




# NAVIGATING THE TIDES OF CHANGE

2016 CPBI Atlantic Regional Conference

September 14 - 16, 2016 • The Algonquin Resort • Saint Andrews, NB



## CPBI ATLANTIC CONFERENCE PLANNING COMMITTEE

### Co-Chairs

**Jeff Alexander**  
Morneau Shepell

**Tina Smith**  
Town of Riverview

### Committee

**Tara Anstey**  
Mercer

**David Harding**  
Industrial Alliance

**Ryan Johnston**  
Manulife Financial

**Jeff Turnbull**  
Eckler Ltd.

**David Tutty**  
Sobeys Inc.

## ACTIVITIES

### WEDNESDAY, SEPTEMBER 14

11:00 a.m. - 6:00 p.m.	Registration desk open
12:00 p.m. - 5:00 p.m.	Golf - Algonquin Golf Course
1:00 p.m. - 5:00 p.m.	Kingsbrae Gardens and Ministers Island Tour
6:00 p.m. - 7:00 p.m.	Reception & entertainment by Steve Dooks
7:00 p.m.	Lobster dinner & entertainment featuring David Myles

### THURSDAY, SEPTEMBER 15

7:00 a.m. - 6:00 p.m.	Registration desk open
7:00 a.m. - 8:15 a.m.	Breakfast
8:15 a.m. - 8:30 a.m.	Opening remarks
8:30 a.m. - 9:30 a.m.	Sessions 1 & 2
9:30 a.m. - 9:45 a.m.	Break
9:45 a.m. - 10:45 a.m.	Sessions 3 & 4
10:45 a.m. - 11:00 a.m.	Break
11:00 a.m. - 12:00 p.m.	Forum A - Margaret Trudeau
12:00 p.m. - 1:15 p.m.	Lunch
1:15 p.m. - 2:15 p.m.	Forum B - Dr. Linda Duxbury
2:15 p.m. - 2:30 p.m.	Break
2:30 p.m. - 3:30 p.m.	Sessions 5 & 6
3:30 p.m. - 3:45 p.m.	Break
3:45 p.m. - 4:45 p.m.	Sessions 7 & 8
6:00 p.m. - 7:00 p.m.	Reception & entertainment by Steve Dooks
7:00 p.m.	Dinner & entertainment featuring comedian Patrick Ledwell

### FRIDAY, SEPTEMBER 16

7:00 a.m. - 12:00 p.m.	Registration desk open
7:00 a.m. - 8:30 a.m.	Breakfast
8:30 a.m. - 8:45 a.m.	AGM
8:45 a.m. - 9:00 a.m.	Closing remarks
9:00 a.m. - 10:00 a.m.	Forum C - Dr. Joe Schwarcz
10:00 a.m. - 10:15 a.m.	Break
10:15 a.m. - 11:45 a.m.	Forum D - Keith Ambachtsheer
12:00 p.m.	Lunch (to go) & departure

## FORUM A - Thursday morning

### **Changing My Mind**

**Margaret Trudeau, Celebrated Canadian and Mental Health Advocate**

Margaret Trudeau is a Canadian icon, celebrated both for her role in the public eye and as a respected mental-health issues advocate. From becoming a prime minister's wife at a young age, to the loss of both her son and her former husband, to living with bi-polar disorder, Margaret tirelessly shares her personal stories to remind others of the importance of nurturing the body, mind, and spirit.

Margaret is the author of four books, including her bestselling title, *Changing My Mind*, which charts her life's ups and downs, and her latest title, *The Time of Your Life*, which offers women an inspirational and practical approach to creating a healthy, happy, secure and satisfying future. She sits on the Executive Advisory Board of the UBC Mental Health Institute as a community advocate, and she is the Honorary President of WaterCan, a charitable Canadian non-governmental agency that is dedicated to helping poor communities in developing countries build sustainable water-supply and sanitation services.



## FORUM B - Thursday afternoon

### **Work-Life Balance Is Difficult For The Sandwich Generation**

**Dr. Linda Duxbury, Human Resources and Work-Life Balance**

The Globe & Mail reports that “a fifth of professionals in the country are working and taking care of both their kids as well as an older family member,” a generation that Dr. Linda Duxbury refers to as the “sandwich generation.” Juggling personal obligations with workplace responsibilities can take a toll on the mental and emotional state of workers. In her insightful keynotes, Dr. Duxbury documents the way the workplace is changing and offers practical solutions to ensure both employee and employer make the most of their time at work.

In the past decade, Dr. Linda Duxbury has completed major studies on balancing work and family in the public, private and not-for-profit sectors. She has completed three national studies on work-life balance in which over 70,000 Canadian employees participated. Dr. Duxbury has published widely in both the academic and practitioner literatures and has given over 350 plenary talks on these issues. She is currently conducting a national study looking at issues associated with balancing work and caregiving as well as a research project evaluating the sustainability of policing in Canada.





## FORUM C - Friday morning

### Hey! There Are Cockroaches in My Chocolate Ice Cream!

Dr. Joe Schwarcz, Author, Professor and Radio Show Host

No, there really are no cockroaches in chocolate ice cream. But one of Dr. Schwarcz's radio listeners did jump to this conclusion after misinterpreting what had been said about a certain food colorant. This highly visual and entertaining presentation examines some serious as well as some frivolous experiences in dealing with the public and emphasizes the importance of fostering critical thinking.

Dr. Joe Schwarcz is Director of McGill University's "Office for Science and Society." He is well known for his informative and entertaining public lectures and has received numerous awards for teaching chemistry and for interpreting science for the public. He hosts "The Dr. Joe Show" on Montreal's CJAD and has appeared hundreds of times on The Discovery Channel, CTV, CBC, TV Ontario and Global Television. In 2015 he was named winner of the Balles Prize for critical thinking by the US based Committee for Skeptical Inquiry.



## FORUM D - Friday morning

### The Future of Pension Management

Keith Ambachtsheer, President, KPA Advisory Services Ltd.

Keith Ambachtsheer provides a fresh look at challenges facing the global pension, governance, and investing sectors in his new book titled *The Future of Pension Management*. In his session, Keith will prompt thought on three fronts, including *pension design* - bringing us a look at the best models from around the world; *pension governance* - reconciling the opposable need for trustees to be both representative and strategic; and *pension investing* - changing investment beliefs and the value in active asset management.

This session is a must from an educational perspective, and will allow delegates to expand their view outside of Canada to form a global perspective. It may even prompt you to take action and pursue change for your pension plan!

Each delegate will also receive a copy of Keith's new book.



## SESSION 1

### **The Benefit Plan of the Future: A Brave New World**

Matt Miles, Vice President, Product & Marketing, GBRS, Manulife

Anne Marie Smith, Pharmacist Consultant, Medavie Blue Cross

Emerging technological and scientific innovations are bringing unprecedented changes to the way plan members access health care. But what do they mean for the long-term sustainability of benefit plans? This session considers how these innovations affect drug therapy, access to treatment and plan costs; how wearable technologies, personalized medicine, genetic testing, adherence monitoring and managed care are shaping new insurance product offerings; and what the implications of these developments are for plan sponsors and plan members.

## SESSION 2

### **Why Invest In Real Estate - Now?**

Peter Cuthbert, Senior Vice President, Partner, Fiera Properties

Most investors and investment advisors with diversified portfolios have accepted the idea that commercial real estate is a viable and useful class of investment given its comparatively lower volatility, low correlation factor with other assets and inflation hedging properties. However, in the face of today's economic realities the question is: Will real estate continue to perform and serve its desired purpose within a diversified portfolio?

In this session, delegates will learn about fundamental investment characteristics, the current state of the Canadian market and a comparison of global markets. Peter will also explore the range of investment strategies available and consider what the future may bring. Together, we will explore the question "Is now the time to hold, sell, or buy real estate in Canada and around the Globe?"

## SESSION 3

### **Healing the Invisible Wounds of PTSD: An Action Plan**

Dr. Joan Wright, Dr. Joan Wright & Associates

The National Standard of Canada for Psychological Health and Safety in the Workplace (the Standard) has made employers focus on mental health and champion supportive wellness initiatives. This session addresses employer compliance concerns with respect to the Standard and the expansion of compensable claims under provincial Worker's Compensation regimes for one of the fastest growing segments of occupational mental health concerns --- post-traumatic stress disorder (PTSD). Increased numbers of employees experience PTSD which is a highly misunderstood illness seriously disrupting a person's life, impacting not only their employment but also their basic social interactions. The speaker will introduce the audience to how work in this field can help employers support employees with PTSD.

## SESSION 4

### **Pension Reform - A Union Perspective**

Wade Kierstead, Former President of Canadian Union of Public Employees Local 3864

Paul Lai Fatt, Partner, Morneau Shepell

Pension reform has been a hot topic in Atlantic Canada for the past decade, with strong emotions and viewpoints tied to this very important issue. Join us as one former union president presents his perspective on the history of his group's pension plan reform and the interaction with various groups such as the plan sponsor, the GNB Task Force on Public Pensions, other union groups, as well as other plan owners. Wade and Paul will look back and share what was learned, as well as provide some key takeaway items for the attendees as the plan looks to the future.

## SESSION 5

### **Industry Drug Pooling: Challenges and Opportunities**

Dan Berty, Executive Director, Canadian Drug Insurance Pooling Corporation

Matt MacLean, Principal, Mercer (Canada) Limited

Established in 2013, the Canadian Drug Insurance Pooling Corporation (CDIPC) is a not-for-profit corporation created by the supplemental health insurers in Canada with the aim of spreading risk and facilitating affordable drug coverage for fully-insured supplementary drug plans. This session will evaluate CDIPC's framework, the respective roles of insurer and industry pools, and emerging experience/trends. The speakers will also discuss marketplace mobility in an age of high cost recurrent drug claims both from an industry and plan sponsor perspective.

## SESSION 6

### **Financial Wellness at Retirement and Beyond**

Chris Cartwright, President and Creative Director, Canadian Centre for Retirement Innovation

The obvious goal of a retirement plan is to reach retirement secure in the knowledge that things will be okay when the paycheque stops. But for many, this time of life is marked by a rising tide of anxiety about what lies over the horizon. Will I have enough to retire? Will my money last? How do I make the transition from saving to spending? What options do I have? Which is the best?

As millions of Canadians enter this phase, the need has never been greater for clear information and education. How do plan sponsors adapt to this challenge, calm their members' fears and ensure their future security? This workshop will address the fundamental issues and choices that members face and how plan sponsors can help them to navigate today's turbulent waters.

## SESSION 7

### **Modernizing Benefits Communications: A Plan Sponsor Case Study**

Karen Fraser, Trustee, Public Sector Group Insurance Plan

Valerie Robinson, Trustee, Public Sector Group Insurance Plan

In an age of rising costs, shrinking resources and information overload, the need for effective and accessible member communications has never been greater. This session addresses communication strategies that leverage scalable technology solutions to support the plan sponsor's value proposition, improve efficiency and mitigate risk. The session speakers will discuss their experiences and key learnings with respect to their member communications modernization initiative.

## SESSION 8

### **The 3 CEOs – A View from the Top**

Steven Wolff, CEO, Nova Scotia Pension Services Corporation

John Sinclair, President, CEO & CIO, New Brunswick Investment Management Corporation

Charles Bruce, CEO, Public Service Pension Plan Corporation

More than \$30 Billion in assets under management. Over 100,000 Stakeholders in 3 provinces. Multiple plan structures in each jurisdiction. The numbers are staggering. New Brunswick Investment Management Corporation, Nova Scotia Pension Services Corporation, and the Public Service Pension Plan Corporation manage those realities every day. These three independent organizations were carved out of each province's Finance Department to service some of the largest and most complex pension plans in Canada.

We are pleased to have the 3 CEOs of these Corporations together on one stage to share their expertise at the conference. Join us as John Sinclair, Steven Wolff and Charles Bruce share their perspectives and experiences on building and leading world-class organizations. You will hear about the trends they see, how they navigate through challenges, where they see their organizations going in the next year and more.



## ENTERTAINMENT

### DAVID MYLES



David Myles has always been attracted to another time. The Nova Scotian singer/songwriter felt the pull of history even as a kid, playing an orphan in an Oliver Twist musical and winning a lip-sync contest to “Heartbreak Hotel” at age seven.

Today, Myles has made a living traversing musical time periods and genres, crisscrossing from folk, roots, pop, jazz, and country, and swinging between the forties, fifties and sixties to today, with the flick of a wrist and the strum of a guitar.

### PATRICK LEDWELL



Patrick’s signature East Coast style has made him a popular host for regional and national organizations, such as CSA and Canadian Chamber of Commerce, and brought him national recognition with regular appearances on CBC’s “The Debaters.”

Raised on PEI, and then returned to it, Patrick Ledwell draws on his experiences growing up in an Island family and the funny trials of staying true to his roots.

### STEVE DOOKS



Steve Dooks never took formal piano lessons; in fact, he only sat down seriously at the piano at age 18. His education came from listening to the “old songs” his father, a semi pro musician, played and sang around the house. While working in summer stock theatre as an actor, Steve landed a role as a pianist and spent six intense months at the keyboard. He never looked back and has spent the last 20 years bringing the unique sound of the Maritimes to the world.

### NEW BRUNSWICK TASTING BAR

Sample some of the finest foods the province has to offer at this New Brunswick themed tasting bar. Enjoy tasting portions of oysters, craft beers, local seafood delicacies and of course, a few surprises!!

## ACTIVITIES

### CONFERENCE GOLF TOURNAMENT

Breathtaking views. Ocean breezes. A challenging game. For over a century, golfers have traveled to Algonquin Golf Course to test their skills and take in the views. Today, the 7,000-yard, par 72 course - redesigned in 2000 by renowned course architect Thomas McBroom - will delight and challenge golfers of every level.



The tournament will be run as a scramble event. The CPBI committee will put individual participants on teams balanced by handicap. All players tee off at 12:00 p.m. sharp. Guests accompanying conference attendees are welcome to play in the tournament.

Transportation will be available to and from the course and you can sign up as part of the conference registration. A limited supply of rental clubs are available by making arrangements directly with the golf club. Contact the Pro Shop at 506.529.8168.

### KINGSBRAE GARDENS AND MINISTERS ISLAND TOUR

Saint Andrews is an historical and culturally rich town. This alternative activity to golf will allow delegates and their guests to experience both in one full and fun afternoon!

First up will be a visit to Kingsbrae Garden, a magnificent 27-acre oasis for flower, plant and art lovers. Within the beauty of the garden, participants will get to enjoy the 'Flower in an Hour' session, which includes step by step instructions on how to paint your own acrylic with Artist Geoff Slater. All supplies are included and of course the budding artist will get to take their artwork home.

Then it's off to Ministers Island! The waters literally have to part to get over to the Island, as you can only visit when the tide is low and cars and buses can make their way over land that is otherwise covered by water. The tour will start on the bus with the Tour Guide providing an introduction to the Island. Upon arrival, the bus will take guests to the Van Horn Estate, where they'll enjoy a 1.5 hour tour of the 50 room estate. Before returning to the bus, guests will be able to take photos of the amazing water views surrounding this location.



We will begin our adventure at 1 p.m. and will have you back to hotel before 5 p.m., leaving plenty of time to get ready for the exciting night ahead!

## REGISTRATION

To register on-line using a credit card or cheque, please go to:

<http://www.cpbi-icra.ca/Events/Details/Atlantic/2016/09-14-2016-Atlantic-Regional-Conference>

Due to limited space, your room may be booked in advance of your conference registration. However, if your conference registration is not received within one week, your room will be released. You are encouraged to book your room and register for the conference at the same time.

### REGISTRATION FEES

**Early Bird Conference Fee\*** - book by **June 30, 2016**

Member \$650.00

Non-Member \$900.00

**Conference Fee\*** - book after **June 30, 2016**

Member \$750.00

Non-Member \$1,000.00

**Spouse Fee** - \$275.00 (includes breakfasts, receptions, evening meals and entertainment)

**Golf Fee** - \$125.00 (spouses/guests are welcome to play)

**Kingsbrae Garden and Ministers Island Tour** - \$80.00 (spouses/guests are welcome to participate)

*All prices are subject to applicable taxes.*

*\*includes conference program and meals*

### CANCELLATION POLICY

Conference and activity cancellations received in writing prior to August 15, 2016 will be refunded in full. If received in writing between August 15, 2016 and August 31, 2016, any conference cancellations will be subject to a \$250.00 penalty and activity cancellations will be subject to a 50% penalty. There will be no refunds for any conference or activity fee received after August 31, 2016 for any reason, including weather or travel delays. Substitutions may be made at no cost. CPBI assumes no liability for changes in program, social activities, event dates or venue.

*Register by June 30th for a chance to win a gift certificate for two nights accommodations at the Algonquin Resort*

## ACCOMMODATIONS

### THE ALGONQUIN RESORT



The Algonquin Resort is one of Canada's most luxurious and legendary resorts. Rich in history, meticulously restored to its original splendour, and complete with every modern comfort you could desire, this year-round destination truly offers the best of the past with contemporary amenities.

Accommodations can be booked with the preferred guestroom rate [at this link](#) or by calling the hotel at 1-855-529-8693 or 506-529-8823. Please identify yourself on the phone as attending the Canadian Pension & Benefits Institute Atlantic Region Annual Conference to receive the preferred guestroom rate.

### ROOM BLOCK DATES

Check-in is 4:00 p.m. on Wednesday, September 14th and check out is 11:00 a.m. on Friday, September 16th. There are a limited number of rooms being held pre and post-conference for those wishing to arrive early or stay late. Reservations must be guaranteed by credit card. Cancellation policy is 24 hours prior to arrival. All rates based on single or double occupancy plus taxes per night. Children 18 years old and under sharing their parents' accommodation are complimentary. Rates are subject to 14% HST and 2% Accommodation Levy (HST Applicable).

### CUT OFF DATE FOR RESERVATIONS

The cut off date for reservations is August 15th, 2016 (Note: the block of rooms will no longer be held after this date and reservations will then be on a first come, first served basis. Rates will also be the rate of the day and availability is not guaranteed after this date).



#### ROOM TYPE

#### SINGLE/ DOUBLE RATE

Algonquin room . . . . .	\$199.00 CDN
Algonquin view . . . . .	\$199.00 CDN
Studio room . . . . .	\$249.00 CDN
Patio room . . . . .	\$249.00 CDN



## QUESTIONS?

### GETTING THERE

#### **Directions to The Algonquin Resort from Saint John, New Brunswick (about 1.25 hours)**

- Take Hwy 1 West to Hwy 127
- Take Hwy 127 South into the town of St. Andrews by-the-Sea
- Turn left on Harriet Street at the first intersection
- Turn right on Prince of Wales Street
- The hotel main entrance is on your right, parking lot on your left

### PARKING AT THE ALGONQUIN RESORT

Self-parking in the outdoor, on-site parking lot is complimentary with your stay. Valet Parking is also available for \$25.00 per day.

### BRINGING YOUR SPOUSE

Your spouse is welcome to join you at the Conference. The spousal fee is \$275.00 and includes breakfasts, receptions, evening meals and entertainment. Check with the hotel for available daytime activities and outings.

### ATTIRE

Casual dress is appropriate for all Conference events.

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If you have any questions about the conference, please contact us at:  
Tel: (902) 835-0391 or [atlantic@cpbi-icra.ca](mailto:atlantic@cpbi-icra.ca)  
[www.cpbi-icra.ca](http://www.cpbi-icra.ca)