HEALTHY, WEALTHY AND WISE

2016 CPBI REGIONAL CONFERENCE ONTARIO & QUÉBEC

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CANADIAN PENSION & BENEFITS INSTITUTE • INSTITUT CANADIEN DE LA RETRAITE ET DES AVANTAGES SOCIAUX

2016 CPBI Regional Conference Speaker Profiles

Paula Allen, Morneau Shepell

Paula Allen is Vice President of Research and Integrative Solutions for Morneau Shepell, focusing on enterprise wide solutions that leverage the integrated value of the firm's expertise, solutions and data analytics.

Paula manages Morneau Shepell's research agenda, which focuses on evidence-based best practices, trend and risk analysis and scalable solution design. Paula also consults directly with clients to ensure that their specific needs are met with respect to both their current and emerging needs. This includes the design and deployment of evidence-based and integrated solutions, as well as establishing the evaluation standard and impact of those solutions.

Michael Barbieri, Mercer

Michael Barbieri is an actuary and Principal and in Mercer's Canadian Retirement business. He is also the Retirement business leader for Mercer's Montreal and Quebec City offices. Michael has over 18 years of experience consulting to national and multinational organizations on retirement issues and a strong understanding of the Canadian market.

Randy Bauslaugh, McCarthy Tetrault LLB

Randy Bauslaugh leads McCarthy Tétrault's national Pensions, Benefits & Executive Compensation practice.

Mr. Bauslaugh has been involved with many of the leading pension and benefit cases over the past 30 years. He is presently counsel to the administrator of the Canadian Nortel pension plans, a lead creditor in the world-wide bankruptcy proceedings. He has experience advising on plan governance, plan design, plan mergers, restructurings and conversions, surplus repatriation, and deficit management. Mr. Bauslaugh has led negotiations relating to pension and benefit issues, and has also acted as a mediator and arbitrator in pension related labour disputes. He has reviewed, negotiated and helped implement investment de-risking strategies. Mr. Bauslaugh's clients include public and private companies, appointed administrators of wound up plans, financial institutions, joint boards of trustees, and Canadian and foreign governments; for example Mr. Bauslaugh has advised the Government of Ontario, the Northwest Territories and Nunavut on pension policy and legislation and the governments of Bermuda, Jamaica, and India on public pension issues and pension standards.

Mr. Bauslaugh a member of the Pension Policy Council of the C.D. Howe Institute and a member of the editorial advisory board of Benefits and Pensions Monitor. He is a former Chair of the International Pension and Employee Benefits Lawyers Association, a former member of the MEPP Consultation Committee of the Financial Services Commission of Ontario, and has held leadership positions in the Canadian Bar Association, Ontario Bar Association, and the Canadian Pension and Benefits Institute. Mr. Bauslaugh is former Chair of the HR Committee of the Board of Directors of the Canadian Cancer Society, former President and Board member emeritus of Theatre Direct Canada, and is a member of the Board of Directors of the Canadian National Exhibition Association.

Sylvain Bouffard, Sun Life Financial

Sylvain Bouffard is Director, Decumulation Solutions at Sun Life Financial. In this role, he leads the development and integration of Sun Life Canada's decumulation offering for the institutional group business, which includes pre and post-retirement client engagement strategies, product offerings, advice, distribution channels and service model. Sylvain has been with Sun Life since 2011. His prior roles included spending 10 years working in the area of economic and public policy. He is a graduate of McGill University (B.A.) and holds a Master's degree from the London School of Economics.

Johanne Brosseau, Consult Med

Holder of a bachelor of science degree and an M.B.A, Ms. Brosseau has worked in sales, marketing research, product and business development management in the pharmaceutical industry, banking and electronic drug claims management.

In the course of her career, namely at AonHewitt and Mercer, she was responsible for the national drug management strategy and implemented innovative strategies to help sponsors optimize private drug insurance management and control costs.

She is known as an expert in the Quebec complex drug insurance environment and has started her own consulting business in September 2015. Licensed as a group insurance consultant, she has elected to work with brokers, manufacturers and other service providers to help them understand the private drug plan realities and develop realistic strategies as well as added value services to increase their business and differentiate from the competition.

Ian Claveau, iA Financial Group

Ian Claveau is Senior Actuarial Consultant with Group Savings and Retirement. He is a Fellow of the CIA and SOA with over 15 years of experience as a pension consultant, both for defined contribution and defined benefit plans. Ian has been working as a senior actuarial consultant in the Group Savings and Retirement department at iA Financial Group since 2015.

Arthur Fabbro, Magna International

Arthur A. Fabbro, Jr. serves as Magna International, Inc., Director, Total Compensation Programs, Canada and the United States since February 2006. He oversees health and welfare programs, as well as group retirement programs with emphasis on overall management, strategy, compliance and governance. Mr. Fabbro also provides oversight, relative to total compensation programs, for mergers, acquisitions and divestitures. He also has experience operating corporate human resource departments with responsibilities for overseeing all functional areas of human resource management for multi-national organizations. Previous to his current role, Mr. Fabbro joined Magna International in 2003 as a Group Human Resource Director for North America, with responsibilities for manufacturing plants in Canada, the U.S. and Mexico. Mr. Fabbro has over 32 years of plant level and executive human resource management experience in a broad range of industries, including automotive, medical device, medical packaging, food equipment and food packaging, as well as retail and distribution management. Mr. Fabbro earned a Bachelor's degree from the University of Michigan and a Master's degree from Northern Michigan University.

Julie Gingras, Government of Quebec, Finance Department

The holder of a master's degree and an undergraduate degree in economics, Julie Gingras has worked for the Québec government, at the Ministère des Finances (finance department), since October 1998. Two years after beginning her career as an economist, she was named team leader. From 2005 to 2008, she spearheaded the fight against tax evasion, and from 2008 to 2010, she was director of own-source revenue analysis and forecasts.

Ms. Gingras was then promoted secretary of the Ministère des Finances and head of coordination for a three-year period. From 2013 to 2015, she headed the Direction générale de l'organisation et de la prévision financière des organismes publics (directorate for public body organization and financial forecasts), and, from 2015 to 2016, she served as director general of own-source revenue and financial organization. Since July 2016, she has represented the Secteur des politiques aux particuliers et de l'économique (policies for individuals and economics division) as acting assistant deputy minister.

Ms. Gingras contributed to the work that led to the balancing of the Québec budget. She has excellent knowledge of budgetary policy and government accounting. She piloted several files pertaining to government enterprises and the governance of state-owned enterprises, and participated in the drafting of numerous bills. In addition, she helped create the committees for concerted action against the underground economy in the tobacco, alcohol, construction and economic crime sectors. She also contributed to the publication of a brief on tax havens, entitled *Le phénomène du recours aux paradis fiscaux*, which was tabled before the Committee on Public Finance.

Luc Girard, Mercer

Luc Girard is an actuary and Partner in Mercer's Canadian Retirement business and a member of its leadership team. Luc has more than 25 years of experience advising organizations in various sectors on their retirement programs as well as advising joint boards of trustees of multi-employer pension plans.

Sal Guateiri, BMO Capital Markets

Sal Guatieri is a Senior Economist and Director at BMO Capital Markets, with over two decades experience as a macro economist. With BMO Financial Group since 1994, his main responsibilities include analyzing and forecasting the U.S. and Canadian economies, housing markets, interest rates and exchange rates. He is a regular commentator on economic and financial market trends to the media. Prior to joining BMO, Sal worked at the Bank of Canada, contributing to the staff's quarterly economic projection and analyzing foreign exchange markets. Sal received his Masters degree in Economics from Queen's University in 1990. He was Secretary for the Toronto Association for Business and Economics from 2000 to 2010.

Norman Helfand, Ministry of Finance, Government of Ontario

Sarah Hilton, Stressed Out Solutions

Sarah Hilton is Founder and CEO of Stressed Out Solutions. It took Sarah Hilton a moment to recognize her passion and her goal for the future; to stop silence, stigma and suicide by speaking out and training workplaces on Mental Health.

It took Sarah Hilton a lifetime of living with her father, diagnosed with Depression, to realize that unless families paid more attention to their children, parents and friends, people will suffer from silence and stigma.

It took Sarah Hilton over 20 years of working in the Mental Health field to come to the conclusion that unless society takes a look at preventing mental illness and promoting mental health she would still be working with the most severe of mental illnesses, chronic and critical.

Claude Macorin, Macor Capital Management

Claude is Principal at Macor Capital Management with over 25 years of experience developing and implementing successful investment strategies across a variety of asset classes.

In addition to serving as a consultant, Claude was Managing Director, Investments at the University of Guelph's Office of Investment Management where he was responsible for all aspects of the University's Pension and Endowment investments.

He has spent 10 years honing his skills as an equity and credit analyst prior to taking on the role of Portfolio Manager at McGill University where he successfully managed a Canadian equity portfolio, real estate and private equity/infrastructure, and acted as an internal advisor.

Claude has extensive experience working with Boards and Board Committees and serves on a variety of committees charged with developing guidance and strategies for institutional investors.

Claude served 14 years on the Pension Investment Association of Canada's Investment Practices and Corporate Governance Committees, and is a representative on the Canadian Pension & Benefits Institute where he is the Treasurer.

Claude is a Chartered Financial Analyst charterholder and has a Bachelor of Commerce from Concordia University and a graduate degree in Management from McGill University.

Barbara Martinez, Great-West Life

Barbara A. Martinez is the National Practice Leader, Drug Benefits Solutions in the Toronto Group Sales office of Great-West Life Assurance Company. Barbara provides support to Great-West Life Group Sales Offices across Canada on our prescription drug management initiatives. She plays a key role in supporting plan advisors and their clients on Great-West Life drug solutions products.

Barb joined Great-West Life in November of 2012 and is ideally suited to this role. She comes to Great-West Life with 10 years' experience at Mercer, where she lead the Canadian drug benefits consulting team. She is also well known as a regular speaker at industry forums and commentator on employer drug programs.

Barbara has in-depth knowledge of the prescription drug, regulatory and drug approval process in Canada from both a government and private drug plan perspective. Her past experience includes 13 years of working in the pharmaceutical industry. Her main responsibilities were sales & marketing as well as government and professional affairs.

Jean-Claude Menard, OSFI-BSIF

Jean-Claude Ménard joined the Office of the Superintendent of Financial Institutions as Chief Actuary of Canada in August 1999.
The Chief Actuary prepares actuarial reports on the Canada Pension Plan, the Old Age Security program, the Canada Student Loans Program, and pension and benefits plans for federal public servants, the Canadian Forces, the Royal Canadian Mounted Police, federally appointed judges and Members of Parliament.

Between 1980 and 1999, Mr. Ménard held progressively more senior roles with the Quebec Pension Board, culminating in his appointment as Chief Actuary and Director of Valuation in 1995.
From 1987 to 1994, he served on an Examination Committee of the Society of Actuaries, the last three years as Vice-Chairman.
From 2002 to 2007, he was Vice-Chairman of the Technical Commission of Statistical, Actuarial and Financial Studies of the International Social Security Association (ISSA). In 2008, he became Chairman of that Commission. In this capacity, he is the official representative of the ISSA and the Canadian Institute of Actuaries on the Social Security Committee of the International Actuarial Association.
In February 2008, he was appointed member of the National Academy of Social Insurance (NASI), a non-profit organization made up of the leading experts on social insurance.
Mr. Ménard has been a Fellow of the Society of Actuaries and of the Canadian Institute of Actuaries since 1985, and is a member of the Quebec Actuarial Club. He earned a B.S. in Actuarial Sciences from Université Laval in Québec City.

Natasha Monkman, Hicks Morley Hamilton Stewart Storie, LLP

Natasha Monkman is a pension and benefits lawyer in Hicks Morley's Pension Benefits and Executive Compensation group. She regularly advises private and public sector employers on a variety of plan administration, compliance and governance matters relating to their employee benefit plans and pension plans.

Susan Nickerson, Torys LLP

Susan Nickerson is a partner in the firm's Pension, Benefits and Employment group. Recognized as a leading pension and benefits lawyer, Susan's practice focuses on all areas of pension and benefits law and governance. She advises clients on issues ranging from risk management and defined benefit to defined contribution pension plan conversions, to implementation of new plan designs and benefit reduction initiatives. She also provides advice on the pension and benefit plan implications of corporate restructurings and insolvencies. With particular expertise in pension plan governance, Susan develops and implements pension plan governance structures and systems.

An active member of the pension community, Susan is a frequent speaker and moderator on emerging industry issues and has a particular interest in policy development on a provincial and national level. She is the Chair of the National Policy Committee of the Association of Canadian Pension Management (ACPM) and a member of

	the ACPM Executive Committee.
	**Jean-Francois Pepin, Addenda Capital** Jean-Francois Pepin is Co-Chief Investment Officer at Addenda Capital Inc. and has been affiliated with Addenda Capital Inc. since January-2012. Addenda Capital Inc. is an investment advisor that manages 21.7 BN dollars in regulatory AUM and has 119 employees, of which 41 perform investment advisory functions. The managers's latest filing has disclosed 1BN in positions, which represents 6% of the manager's regulatory AUM.
	**Ned Pojskic, Green Shield Canada** Ned Pojskic is the Pharmacy Strategy Leader at Green Shield Canada (GSC). In this role he is responsible for setting GSC's strategic direction in pharmacy benefits management, including formulary design and management, pricing and policy. In addition, Ned is responsible for stakeholder relations with both the pharmacy and pharmaceutical industry. Ned brings a wealth of experience in policy, advocacy, and government relations through his previous role as the Director of Health Policy at the Ontario Pharmacists Association. Ned holds Masters and PhD degrees from the Department of Pharmaceutical Sciences at the University of Toronto. He is currently appointed as an Adjunct Professor (Status) at the Leslie Dan Faculty of Pharmacy in the University of Toronto.
	**Michael Quigley, Phillips, Hager & North** Michael is National Business Development Lead and member of the Canadian Institutional Management Team at Phillips, Hager & North Investment Management (PH&N IM). Michael's primary accountability is to support and advance new institutional relationships, while also supporting business development initiatives for existing clients. He joined PH&N IM in 2013, with over 20 years' experience in the asset management industry, in both Canada and the U.S. Prior to joining PH&N IM, Michael was Vice Chairman and Senior Vice President of Distribution at a national investment management firm. Michael is a CFA charterholder.
	**Jean-Pierre Simard, Government of Quebec, Finance Department** The holder of a master's degree in sociology, Jean-Pierre Simard has worked for the Québec government since 1990. He spent the first 11 years of his career as a professional at the Ministère de l'Emploi et de la Sécurité du revenu (employment and income security department) and the Ministère des Finances (finance department). Subsequently, Mr. Simard held the positions of director of social policy, from 2001 to 2007, and director of taxation of individuals, from 2008 to 2013, at the Ministère des Finances. Since 2013, owing to his deep expertise in policies pertaining to individuals, he has advised the deputy minister of finance as director general. Mr. Simard was involved in the last 23 Québec budgets, greatly contributing to the development and implementation of the fiscal and budgetary measures pertaining to individuals. The principal initiatives to which he contributed include the introduction of work premiums and the child assistance payment, the 2008 general tax reduction and the health contribution. Mr. Simard also had three calculators developed, which were incorporated into the Ministère des Finances website. More recently, he has focused primarily on pension plans. He represented Québec at this year's proceedings of the federal-provincial-territorial committee on the enhancement of the Canada Pension Plan.

	**Jill Taylor-Smith, Eckler Ltd.** A senior consultant with Eckler, Jill specializes in helping clients manage their DC plans effectively. As such, her work encompasses recordkeeper searches, fee reviews, recommending and monitoring investment platforms, developing plan governance, and assisting with plan design and benchmarking. In a career spanning over 20 years, Jill has held a series of progressive roles at several financial institutions, including product development, head of investment management research at a leading consulting firm, and investment consultant. Through her work experience, she has acquired extensive knowledge of investment firms and the expertise required to conduct a thorough evaluation of service providers on behalf of clients. Jill holds a Master's degree in economics from Queens University and a Bachelor of Arts in mathematics with economics from the University of Western Ontario. She also has her Chartered Financial Analyst (1999) and Certified Financial Planner (2011) designations.
	**Frederick Vettese, Morneau Shepell** **Frederick Vettese** is Chief Actuary of Morneau Shepell. Fred has spent his entire career providing retirement consulting and actuarial services in respect of workplace pension plans. Much of his professional time is spent in the public eye, speaking at industry conferences, writing on retirement issues for Canada's national newspapers and giving TV and radio interviews. He is also a member of the C.D. Howe's pension policy council. Fred has written two retirement books. The first one was 'The Real Retirement', which he co-authored in 2012 with Bill Morneau who is now Canada's Minister of Finance. The book explains why Canada does not have a financial crisis. Fred's second book, 'The Essential Retirement Guide: A Contrarian's Perspective' was published by Wiley in December 2015. Morneau Shepell is the largest company in Canada offering human resources consulting and outsourcing services. With 4,000 employees, the Company is the leading provider of employee and family assistance programs, the largest administrator of retirement and benefits plans and the largest provider of integrated absence management solutions in Canada. Established in 1966, Morneau Shepell serves approximately 21,000 clients, ranging from small businesses to some of the largest organizations in North America. Morneau Shepell is a publicly-traded company on the Toronto Stock Exchange (TSX: MSI).
	**Joan Weir, CLHIA** Joan is the director of health and dental policy for CLHIA (Canadian Life and Health Insurance Association), a voluntary trade association with member companies that account for 99 percent of Canada's life and health insurance business. In her role, Joan is responsible for analysis on industry issues, policy strategy development and to build consensus on concerns important to member companies. An important part of the health portfolio is working within industry and with provincial/federal payers on drug plan strategy and sustainability. Joan brings 20+ years of benefits management expertise to her position at CLHIA, having worked for insurers and administrators on both private and public sector programs, notably with First Canadian Health and Health Canada on the NIHB program and most recently with Medavie Blue Cross.