

## PRESENTATION DESCRIPTIONS

### **Moving Forward by Looking Back**

**Wednesday, April 13, 2016, 9:00-10:00 a.m.**

**Dave Wild**, Associate Deputy Minister of Finance, Public Employees Benefits Agency (PEBA)

Over his thirty year career in the pension industry, Dave Wild has demonstrated innovation! His accomplishments include the establishment of the Saskatchewan Pension Plan, Greystone Capital Management Inc., and the Financial and Consumer Affairs Authority; the growth of the Public Employees Pension Plan (PEPP) into the largest defined contribution plan in Canada; and public policy developments such as the Capital Accumulation Plan (CAP) Guidelines, pension alternatives to annuities, Fund Facts for mutual funds, and resolution of pension disputes at the University of Saskatchewan and City of Regina. Dave will share with us what he has learned about evolution through innovation in the pension industry.

### **BREAKOUT #1: Wednesday, April 13, 2016, 10:30-11:30 a.m.**

#### **The “Big Bang Theory” of Sustainability**

**Troy Milnthorp**, Associate Partner, Aon Hewitt

**Colyn Lowenberger**, President and CEO, Möbius Benefit Administrators

Pension sustainability has evolved into one of the most important issues of our time and stakeholders across all groups continue to look for innovative solutions that meet the needs of all parties involved. Although initially people used to relate sustainability to financial sustainability, it has evolved into a much broader discussion involving communications, labour relations, governance, dispute resolution, compensation, legislation, and so much more. This presentation will cover all aspects of sustainability, including several recent case studies in Saskatchewan.

#### **Impact of a Comprehensive Wellness Program: An Employer Case Study**

**Michael Kennedy**, Vice President, National Leader of Health Strategies and Solutions, Aon Hewitt

**Trent Dixon**, Manager, Canadian Natural Resources Limited

Canadian Natural Resources Limited has a strong commitment to employee wellness. This case study will explain how support was built with senior leaders as well as with employees around the organization. It will describe the innovative programs that are being offered and how incentives and spending accounts are encouraging healthy behaviour. Insights will also be shared about the results – both in terms of changes in employee health as well as changes in benefits costs – that are being seen from the evaluation of the program.

## Treating Workplace Stress: A Doctor's Prescription

Wednesday, April 13, 2016, 12:30-1:30 p.m.

**Dr. David Posen M.D.**, “Doc Calm”- Bestselling Stress & Wellness Authority

As the pace of work continues to increase, the economy sputters and jobs are in short supply, organizations and the people who run them keep ramping up the stress levels on their employees. Some workers wear their stress like a badge of honour; others resign themselves to what they see as the “new normal” and accept the situation as “the way it is”. The real truth is that workplaces are making people sick. Not enough people are talking about it, and when they do, no one is listening. Join bestselling author and renowned speaker on stress, David Posen MD, for a revealing look at workplace stress - what’s causing it and what can cure it.

Discover ...

- The scope and cost of workplace stress.
- How the conspiracy of silence affects everyone.
- The misconceptions about productivity.
- The fallacy of face time and the futility of long hours.
- The myth of multi-tasking.
- Simple, yet enlightened strategies to fix the problem.

## BREAKOUT #2: Wednesday, April 13, 2016, 1:45-2:45 p.m.

### Putting Risk First - Recent Innovations in the Alignment of Assets with Liabilities

**Dave Larsen**, Partner, Aon Hewitt

**Jeffrey King**, Senior Consultant, Aon Hewitt

Administrators know that providing promised benefits to members requires a great deal of effort to ensure the presence of sufficient funds. Administrators, and their trusted advisors, devote considerable resources in developing the appropriate benefit policies, funding policies, investment policies, governance policies, etc. Each one an important policy document. The combined effect is policies covering all aspects of liabilities and assets. Innovative and forward looking administrators are approaching the development of these necessary policies from a risk first perspective.

This presentation will lead a discussion on how the proper alignment of assets and liabilities begins with an understanding of the benefits promise, of today and of tomorrow, and of the risks that accompany the promise. It is only with a clear understanding of the benefits plan structure and risks that assets can be properly aligned with the liabilities.

### Managing Absence in 2016: Innovations and Trends in Disability Management

**Dave Jones**, Vice-President, Group Life & Disability, Sun Life Financial

Gain insight into how today's trends and innovation in health and disability management are shaping absence management in Canadian organizations. Canadians value and rely on their employer sponsored benefit programs and need them more than ever. As employers seek to differentiate themselves to employees by offering competitive programs, they are faced with the ever increasing complexity of disability management. Dave will provide an overview of today's trends and innovations in disability management including case management, the evolution of mental health in disability, the impact of wellness investments, approaches to integrated health, integration with the Canadian Healthcare System, and approaches to partnership. Dave will also share insights on how these trends are impacting absence management in 2016 and their potential future impacts to sponsored programs, the workplace, and the employee experience.

## Cross Examination Demonstration

Wednesday, April 13, 2016, 3:15-4:15 p.m.

**Reginald Watson**, Partner, Miller Thomson  
**Lorna Selinger**, Manager, Human Resources, 3sHealth  
**Cheryl Pockrandt**, Disability Income Adjudicator, 3sHealth

Reg Watson will take you into the courtroom and demonstrate how well you need to be prepared in the event your benefit plan gets challenged from a legal perspective. Reg, acting for the plaintiff, will cross examine two of the defense's witnesses. The case will involve an employee whose disability benefits were discontinued at the end of the "own occupation" period. In this case, disability benefits were terminated as the plan adjudicator determined the plaintiff was not disabled from "all occupations" and the defendant did not follow the requirement under the insurance policy to fully participate in a rehabilitation plan.

The first witness is represented by the human resource professional who attempted to assist the plaintiff to return to work. The second witness represents the adjudicator (or administrator) of the plan.

An independent judge will be selected from the audience.

## BREAKOUT #3 (Pension & Benefits Combined):

Thursday, April 14, 2016, 9:00-10:00 a.m.

### Rethinking Engagement of Pension and Benefits Plan Members

**Nigel Branker**, Partner, Morneau Shepell

**Dr. Bill Howatt**, Chief Research and Development Officer, Workforce Productivity,  
Morneau Shepell

Presentation description to follow.

## BREAKOUT #4: Thursday, April 14, 2016, 10:30-11:30 a.m.

### Pension Law Update

**Murray Campbell**, Partner, Lawson Lundell LLP

This presentation will explore the latest developments in public sector pension plan redesign in Saskatchewan, the latest pension case law, and the latest developments in pension plans and mandatory retirement.

### Innovation Brings Drug Plan Savings: A Case Study

**Randy Lewis**, President, Lewis Consulting  
**Anne Chehade**, Western Canada Business Development Manager, Express Scripts Canada  
**Randy Wehrkamp**, Former Manager of HR, Cornerstone Credit Union

This presentation will explore how one multi-employer program took a bold and innovative step to reduce drug costs, improve employee service, and improve drug adherence by introducing a preferred pharmacy. Through this case study, you will gain perspective from the consultant, the client, and the provider on how the program was implemented, communicated, managed, and the results after one year.

## **TOUCH: Five Factors to Growing and Leading a Human Organization**

Thursday, April 14, 2016, 12:15-1:15 p.m.

**Tod Maffin**, Digital Marketing and Technology Expert

For better or worse, digital business has fundamentally changed how organizations hire staff, market their services, and connect with stakeholders. The problem is, in an effort to use technology to connect with people more effectively, we have lost the humanity — that critical person-to-person connection — which is the engine of commerce. In a world filled with complicated web forms and digital marketing services, we have lost the “human” element in how we run our organizations. In this keynote presentation, Tod Maffin identifies these problems in stark terms, then provides business leaders in all types of organizations — private to public sector, small to enterprise business — with real-world, tested solutions.

**BREAKOUT #5: Thursday, April 14, 2016, 1:30-2:30 p.m.**

### **Global DC Innovations - Trends and Their Impact for Canadians**

**Matthew Williams**, Vice President, Head of Defined Contribution  
Franklin Templeton Investments Corp.

With the silver tsunami of retirees swelling, this session explores the macro issues DC plan sponsors face globally, and how Canadians should embrace these trends for their DC plans.

### **Self-Service in Benefit Plans and Pension Administration**

**Laura Simon**, Director, Group Benefits & Retirement Digital Solutions  
Manulife Financial

Online self-service has become a crucial element to customer success and is now beyond a table stake requirement. We are in an era where most customers proclaim themselves to be “self-service junkies”. We exemplify a meaningful relationship as the one we have with our smartphone. Because of this, companies must embrace opportunities to leverage these interactions and accept the impact of the evolution of customer service from being a business cost center to a differentiator.

## **How are we Evolving? Our Approach to a Successful Human Resource Information System (HRIS) Implementation**

Thursday, April 14, 2016, 2:45-3:45 p.m.

**Chris Perkins**, Director, HR Shared Services, The Co-operators

This presentation will provide a case study on the creation of a human resource (HR) corporate service team that includes the selection and implementation of a common payroll and HR capital management system. The presentation will guide attendees through the journey of the opportunity, tipping point, request for proposal, lessons learned, change management, benefits, and new hope of that change. In addition to the story of the journey, a few tools will be offered related to change management, impact assessment, and project integration.

**SPEAKER BIOGRAPHIES**

**Dave Wild**

**Associate Deputy Minister of Finance, Public Employees Benefits Agency**



Dave Wild is the Associate Deputy Minister of Finance responsible for the Public Employees Benefits Agency (PEBA). PEBA administers pension and benefit programs that cover a broad range of employees including the Government of Saskatchewan, provincial Crown corporations and municipal governing bodies. PEBA serves over 90,000 members and retirees and the combined assets of the plans administered by PEBA total \$11 billion.

Dave has a distinguished career in the regulation of financial services in Saskatchewan having served as the Chair and CEO of Financial Consumer Affairs Authority, Chair of Saskatchewan Securities Commission, Superintendent of Pensions, Superintendent of Insurance, Registrar of Credit Unions, Superintendent of Financial Institutions and Superintendent of Real Estate. He is past Chair of the Joint Forum of Financial Market Regulators as well as the Canadian Association of Pension Supervisory Authorities.

**Troy Milnthorp**

**Associate Partner, Aon Hewitt**



Troy is an Associate Partner in Aon Hewitt's Saskatoon office. As a member of the retirement strategies team, Troy provides pension and actuarial consulting services to clients both locally and across the country. Troy specializes in the design and implementation of retirement arrangements for organizations and executives. He has a broad knowledge of accounting principles and methods for pension and other benefit plan costs under Canadian and International accounting standards. Troy has extensive experience working with the public sector in Saskatchewan in all different aspects of retirement. Troy recently completed the development of the Target Retirement Income Plan for the Regina Police Service, along with the Saskatoon Police Pension Plan and the Saskatoon Fire Firefighters' Pension Plan, all target benefit plans in

Saskatchewan. Troy is the National Leader for Aon Hewitt's Target Benefit Task Force and is a member of Aon Hewitt's National Public Sector Task Force.

Troy joined Aon Hewitt in October of 2000, after graduating from the University of Saskatchewan with a Bachelor of Science degree (Honours) majoring in Statistics. He is a fellow of the Society of Actuaries and Canadian Institute of Actuaries. He is a frequent speaker on various pension related topics, however, has spent the last few years presenting at conferences on the topic of pension sustainability and solutions to achieve sustainability.

### Colyn Lowenberger President and CEO, Möbius Benefit Administrators



Colyn Lowenberger brings 20 years of experience in finance and investments to his role as President and CEO of Möbius Benefit Administrators. In his role, Colyn's responsibilities include development and execution of the overall strategic direction for five separate benefit plans, and leading the organization to achieve both its short-term and long-term business results. Prior to spearheading the establishment of Möbius, Colyn spent 8 years leading the pension and investment functions of the City of Regina, culminating in the implementation of creative solutions to the challenges previously faced by the plans administered by the city. Before joining the City of Regina, he spent 10 years in banking and investment with BMO and CIBC. Colyn holds an MBA from the

University of Regina, an M. Cert. in management and a B.Sc. with a double major in mathematics and statistics.

### Michael Kennedy, Vice President, National Leader of Health Strategies and Solutions, Aon Hewitt



For almost 20 years, Michael Kennedy has been working with organizations to design, develop and deliver effective workplace health programs.

Mike graduated with an Honours degree specializing in Health Promotion. He was co-founder of a firm providing disability management, occupational health, wellness, and occupational medicine services, and he also worked for a leading EAP firm as a subject matter expert in health management.

Currently a Vice President in Aon Hewitt's Health and Benefits practice, Mike is the National Leader of Health Strategies and Solutions. He and his team work with clients across Canada using analytics to identify priorities, to design efficient and effective health programs, and to launch and manage the delivery of programs to produce demonstrable outcomes.

### Trent Dixon Manager, Canadian Natural Resources Limited



Trent Dixon is a just a simple HR guy with over twenty years of experience doing simple HR things. He is currently the Manager of Assorted HR Stuff (including benefits) at Canadian Natural Resources Limited.

As part of his role, Trent is responsible for Canadian Natural's Wellness Program called *Strive*. *Strive* was launched in 2012 and has quickly become embedded in the company's culture.

When he's not doing HR stuff you can usually find Trent on a bicycle or a golf course and he is hoping one day to combine the two activities.

### Dr. David Posen M.D. “Doc Calm”- Bestselling Stress & Wellness Authority



To really know David Posen, author, speaker, physician, athlete, musician and family man, imagine an adventurer who regularly stops to chat with people along his travels – to observe and, most of all, to listen and learn.

There are talkers and there are listeners. David is both: an interesting talker and a keenly interested listener. As a speaker, David has enthralled and compelled corporate and professional audiences across North America.

David’s ability to listen – to his patients, audiences, colleagues, friends and even himself – has resulted in three bestselling books, ***Always Change a Losing Game***, ***Staying Afloat When The Water Gets Rough***, and ***Little Book of Stress Relief*** now in its twelfth printing and translated into six languages. David’s latest book ***Is Work Killing You?*** was released in February of 2013.

Befitting an adventurer, David worked on a research project in San Francisco before graduating from the University of Toronto Medical School in 1967. He then interned in Edmonton, Alberta and practiced in the Canadian Arctic and Jerusalem before settling in Oakville, Ontario in 1971.

More than a decade into a highly successful family practice, David changed his game plan to focus on stress management and lifestyle counselling. Along the way, his buoyant approach to life’s challenges has helped countless people stay afloat!

### David Larsen Partner, Aon Hewitt



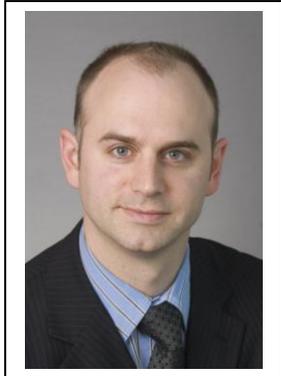
David Larsen is a Partner in Aon Hewitt’s Saskatoon office. He provides actuarial and consulting services in retirement and disability arrangements to key clients of the firm locally and across the country. He is also a member of the Canadian commercial development team for Aon Hewitt.

David specializes in the design, and implementation, pricing and administration of retirement arrangements and self-insured short and long term disability arrangements for organizations in both the public and private sector. He has extensive experience in consulting to multi-employer pension and disability plans that are governed by a Board of Trustees or Benefits Committee made up jointly of union and management representatives. He also has extensive experience in accounting for pension and other benefit plan costs under Canadian (public and private sectors) and international accounting standards.

David joined Aon Hewitt’s professional staff in 1988. His consulting assignments have included: design and implementation of all types of retirement arrangements as well as short and long term self-insured disability plans. Assignments have included consulting to defined benefit, defined contribution, multi-employer and executive pension plans, flexible benefit plans and retirement planning seminars. He has extensive experience in performing experience studies, pricing and valuation of self-insured disability income plans, including various cost containment approaches. He has lead various asset/liability modeling studies and investment manager searches, design of funding policies, de-risking and risk budgeting policies for both retirement and disability plans.

David graduated from the University of Saskatchewan with a Bachelor of Science degree, with Honours in 1989 and is a Fellow of the Canadian Institute of Actuaries and a Fellow of the Society of Actuaries.

## Jeffrey King Senior Consultant, Aon Hewitt



Jeffrey King is a Senior Consultant in Aon Hewitt's Investment Consulting practice, serving the Prairie region out of the Regina office.

Working with clients ranging from public and private pension plans, public and private foundations, to multi-employer pension plans, Jeffrey has developed a broad array of experience and expertise. Jeffrey supports clients through strategic planning guidance, investment policy development, asset optimization modeling, asset liability studies, manager reviews, manager searches, transition management projects, and performance monitoring and analysis.

Jeffrey is registered as an associate advising representative and dealing representative (exempt market) with the Securities Division of the Financial and Consumer Affairs Authority of Saskatchewan.

Jeffrey has contributed to industry events sponsored by the Canadian Pension Benefits Institute and the Association of Investment Management Sales Executives.

Jeffrey has been with Aon Hewitt for over 13 years, joining shortly after completing his degree. Jeffrey received a Bachelor of Business Administration degree, with Honours, from the University of Regina. Jeffrey received the Chartered Financial Analyst designation in 2004.

## Dave Jones Vice-President, Group Life & Disability, Sun Life Financial

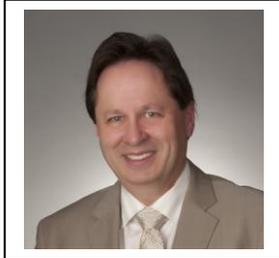


Dave Jones is Vice President, Group Life and Disability, for Canada. In this role, Dave's mandate is to lead a national team that partners with clients to deliver and continually innovate leading edge absence management programs.

Since joining Sun Life Financial in 2003, Dave has held various roles in strategic projects, marketing, and operations. Prior to joining SLF, Dave worked for an IT outsourcing organization and as a management consultant.

Dave holds an Honours BComm from Queen's University and a Masters of Business Administration (MBA) from the Rotman School of Management, University of Toronto. He is an avid runner and cyclist and, when not at work or training, Dave can be found enjoying childhood all over again with his two sons Ben and Luke.

## Reginald Watson, Partner, Miller Thomson



Reginald Watson is a partner in the Saskatchewan offices of Miller Thomson where he practices primarily before the Court of Queen's Bench. Reg's caseload includes the prosecution and defence of claims involving commercial disputes, medical negligence, disability, no-fault insurance, wrongful dismissal, personal injury and related class actions. Reg also has an active appellate practice within his practice areas. His active health law practice includes regular appearances before a variety of professional regulatory tribunals.

Reg has conducted several civil jury trials and is adept in the use of a variety of demonstrative trial techniques.

Reg has lectured extensively throughout the province for over 20 years in areas related to trial practice and health law. Reg has been recognized by Best Lawyers in Canada in the areas of Health Care, Medical Negligence, and Personal Injury Litigation for several years.

In an environment where few civil cases actually go to trial, Reg goes to trial on a regular basis. Reg's training as a commercial pilot and flying instructor has proved to be invaluable as many health protocols now draw on concepts and procedures that have been used in the aviation industry for decades.

Reg received his LL.B. from the University of Saskatchewan in 1979 and his B.Admin from the University of Regina in 1976.

## Lorna Selinger, Manager, Human Resources, 3sHealth

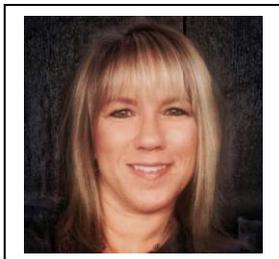


Lorna Selinger is the Manager of Human Resources for 3sHealth. Prior to this position, she was a Human Resources Consultant for eHealth Saskatchewan. She worked as a Senior Consultant for the Strategic Human Resources and Employee Relations Department of the Saskatchewan School Boards Association (SSBA) for four years. Before joining SSBA, she was employed with the Regina Qu'Appelle Health Region for eight years - five years as a Labour Relations Consultant and three years as an Attendance/Accommodation Consultant. Prior to that, she worked for three years at the Saskatchewan Workers' Compensation Board as a Client Services Representative in the long term disability claims area.

A Certified Human Resource Professional (CHRP), Lorna received her BA in English/Psychology from the University of Regina, and her certification in Reality Therapy and Choice Theory from the William Glasser Institute, of which she is a member. She is currently pursuing Certified Coach Training with Destination Leadership.

Lorna is a current member of the Saskatchewan Chapter of the International Coaching Federation.

## Cheryl Pockrandt, Disability Income Adjudicator, 3sHealth



Cheryl Pochrandt has worked with 3sHealth as a Disability Income Adjudicator since May 2015. Cheryl started in the insurance industry working for Canada Life in 1999 as an Individual Life Claims Coordinator and then moved into her first role in group disability income with Canada Life as a Disability Claims Specialist in 2001. Since then, Cheryl has continued her career in disability case management with Great-West Life, Sun Life, and The Co-operators prior to joining 3sHealth. With over 14 years of experience managing disability cases you would think that nothing would be a surprise; however, Cheryl finds every day an opportunity for learning and growth through challenge.

### Nigel Branker, Partner, Morneau Shepell



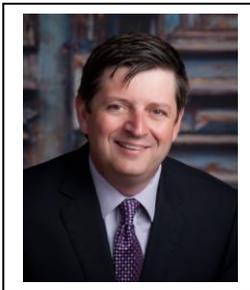
Nigel Branker is a Partner at Morneau Shepell and leads the Ontario Pension Consulting Practice. An actuary with 20 years of experience providing strategic advice on pension plans and other retirement benefit arrangements, Nigel serves as client relationship lead and trusted advisor to a large number of Morneau Shepell's clients.

With a strong understanding of multiple lines of business, the industry, and our clients' businesses, he delivers responsive and forward-thinking solutions that best meet organizations' needs and objectives, while leveraging Morneau Shepell's complete service offering.

Nigel is an experienced thought leader in both defined benefit and defined contribution pension plan design. He has a wide range of experience with plan implementation and financial management, member education and communication, as well as integrated administration solutions.

Nigel is a Fellow of the Canadian Institute of Actuaries and a Fellow of the Society of Actuaries. He has an Honours Bachelor's degree in Actuarial Science and Mathematics from the University of Western Ontario. He is a regular author and industry speaker.

### Dr. Bill Howatt, Chief Research and Development Officer, Workforce Productivity, Morneau Shepell



Bill Howatt, Chief Research and Development Officer for Workforce Productivity, Morneau Shepell, has over 25 years of experience in strategic HR, mental health and addictions, and leadership. He has published numerous books and articles, such as: *The Coping Crisis*, *Pathways to Coping*, *TalOp®: Taking the Guesswork Out of Management*, the *Howatt HR Elements Series*, the *Wiley Series on Addictions*, *Human Services Counselor's Toolbox*, *The Addiction Counselor's Desk Reference*, and *The Addiction Counsellor's Toolbox*. He is the author of *Beyond Engagement: The Employee Care Advantage* and the creator of the Quality of Work Life (QWL) methodology and survey. He is the co-author of behavioral engineering, a strategy aligned to the QWL to provide guidance on how to lead employees to facilitate behavioral change.

He is a regular contributor to *The Globe and Mail* and is the driver behind the Your Life at Work initiative, where there is a mini version of the QWL that has been explored by over 10,000 Canadians.

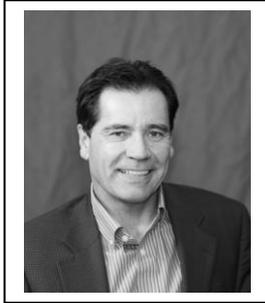
Bill Howatt, is Ph.D., Ed.D., Post Doctorate Behavioral Science, University of California, Los Angeles, Semel Institute for Neuroscience and Human Behavior, RTC, RSW, ICADC.

### Murray Campbell, Partner, Lawson Lundell LLP



Murray Campbell is a pension lawyer who acts for boards of trustees and other sponsors of pension and benefit plans in the private and public sectors in British Columbia, Saskatchewan and Alberta. While Murray is a solicitor, he is regularly involved in pension and benefit litigation. Murray is the head of Western Canada's largest and most experienced Pensions and Benefits Law Group.

### **Randy Lewis** **President, Lewis Consulting**



Randy Lewis is President of Lewis Consulting. A graduate of the University of Alberta, he served in the Insurance industry for over 21 years with major Insurers before forming Lewis Consulting in 2004. Randy has successfully built relationships with clients that share a desire to be innovative and understand that the key to benefit cost leadership lies with intelligent plan design, comprehensive claiming metrics, wellness, and employee empowerment. Randy works with both large and small employers. He has provided consulting services to Health Canada, the Saskatchewan Drug Plan, the Medical Associations of Saskatchewan, Alberta, and British Columbia, and almost all of the major Credit Unions in Saskatchewan. He is an active cyclist, skier, and rodeo photographer. Married to Amanda for over 32 years, they have a 23 year old daughter and two loveable but sometimes annoying dogs.

### **Anne Chehade** **Western Canada Business Development Manager, Express Scripts Canada**



Anne Chehade's career has seen her work with industry leaders in the area of sales and business development. She has been successful in developing programs and markets by understanding key trends and subscribing to a simple acrostic for success: surround yourself with positive people, understand yourself, care more than others expect, commit to your goals, escape the trivial and mundane, envision your success, and develop a passion for something that will make a positive difference. Over the past years, she has taken her passion for preventative health care and teamed it with a serious look at the key sustainability issues facing organizations in remaining competitive in the talent and employment market. She takes pride in the relationships she builds and the trust she earns. Over the last 5 years, Anne's area of focus has been on the Health and Wellness sector in Canada and recognizes the challenges and trends all employers are faced with when it comes to the significant investment required in their employee's health and well-being.

### **Randy Wehrkamp** **Former Manager of HR, Cornerstone Credit Union**

Biography to follow.

### Tod Maffin Digital Marketing and Technology Expert



Tod Maffin is president of *engageQ digital*, a digital marketing agency that helps such brands as the Grey Cup, Mountain Equipment Coop, Ivanhoé Cambridge, Abbott Pharmaceutical, OK Tire, and more.

He is co-author of *TOUCH: Five Factors to Growing and Leading a Human Organization* and two other books. His insights on the future of business have been covered by major media including the Globe and Mail, USA Today, CBC, the Huffington Post, and more.

His energetic, upbeat, jargon-free and highly entertaining presentation style ensures that audiences are not only captivated and engaged, but entertained and motivated. He has addressed audiences around the world — from Stockholm to Berlin and from Romania to Australia — and is one of very few speakers capable of bringing an audience to their feet in a standing ovation at 7am.

In January 1999, he founded *MindfulEye*, an artificial intelligence firm that developed the patented Lexant technology to perform syntactic analysis on public opinion comments posted on the Internet and aired in the media, thus providing a “mood monitor” of stocks. *MindfulEye* went public in 18 months and precipitated a meteoric rise in his popularity as a technology futurist.

Today, thousands of professionals in the international media, technology, and business communities follow Tod’s insights. He continues to report on national technology trends on CBC Radio, is the past host of *todradio dot com* and *Real Life Chronicles*, and was one of the world’s first podcasters and web masters.

### Matthew Williams, Vice President, Head of Defined Contribution, Franklin Templeton Investments Corp.



Matthew Williams is the head of Defined Contribution for Franklin Templeton Investments (FTI) in Canada. Joining FTI in April 2013, he is responsible for setting and executing the national Defined Contribution strategy in this fast growing segment.

Mr. Williams has over 20 years of experience in the commercial activities of wealth management and investment management in Australia and across Asia. His previous role was head of marketing, Asia Pacific, with ING Investment Management.

While in Asia, Mr. Williams advised sovereign and quasi sovereign institutions on the development of their pension models and wrote a regular investment column for the Hong Kong Economic Journal. Mr. Williams also lectured at the Securities Institute of Australia and contributed to various industry committees in Australia and Hong Kong. He is also a member of the Defined Contribution Institutional Investment Association (DCIIA) global committee.

Mr. Williams' industry experience is coupled with a Master of Commerce (majoring in financial planning) from the University of Western Sydney and an M.B.A. from Southern Cross University, Australia. He has also completed the Hong Kong Securities Course for Responsible Officers and the Canadian Securities Course.

### **Laura Simon**

#### **Director, Group Benefits & Retirement Digital Solutions, Manulife Financial**



With a background in digital strategy and development, Laura Simon has been leading Manulife's combined Group Benefits and Retirement Digital Solutions team for the past 3 years. Prior to her current role, Laura secured tenure as a Manulife veteran in the areas of Group Benefits product development, cross-divisional project management, and has an impressive inventory of large project implementations, focused on technology, under her belt. A graduate of the business program from Sir Wilfrid Laurier University, Laura brings great experience to the Manulife team, including as a very strong and passionate leader.

### **Chris Perkins**

#### **Director, HR Shared Services, The Co-operators**



Chris Perkins is a Certified Human Resources Leader, a Chartered Insurance Professional, and has a Bachelor of Arts degree in Psychology. He has worked at The Co-operators for 20 years in various roles, most recently as Director of HR Shared Services. During his time as Director of HR Shared Services, The Co-operators has ambitiously migrated 10 systems, 3 payroll centres, and 45 interfaces into one HR Shared Services department with a consolidated single source system. Today, the HR Shared Services department represents over 5600 active employees, 2000 retirees, and over 9 legal entities, and responds to 7000 annual support calls and 40,000 HR/payroll transactions requiring HRIS system outcomes.