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2014 CPBI SASKATCHEWAN REGIONAL CONFERENCE
HOTEL SASKATCHEWAN, REGINA | APRIL 9 & 10, 2014

CONFERENCE AGENDA

Wednesday, April 9, 2014

- 7:45-8:45 am Registration
- 8:00-8:45 am Breakfast
- 8:45-9:00 am Opening Remarks

9:00-10:00 am **Sustainability – A Key Component to a Healthy Corporate Culture**
Kathy Bardswick
President and Chief Executive Officer
The Co-operators Group Limited

Plenary Sponsored by:



10:00-10:15 am Refreshment Break

Refreshment Break Sponsored by:



10:15-11:15 am Breakout Session:
Defined Benefit Plans – Are They Sustainable?
Leah Fichter, Director, Pensions Division
Financial and Consumer Affairs
Authority of Saskatchewan

Breakout Sessions Sponsored by:



Driving Better Benefits Performance Through Organizational Health
Kim Siddall, Principal, AQ Group Solutions



CONFERENCE AGENDA

11:15-11:30 am **CPBI Saskatchewan Annual Meeting**

11:45 am-1:15 pm Luncheon with Special Guest Speaker:
Jon Montgomery
Host of *The Amazing Race Canada* and Olympic Gold Medalist

1:30-2:30 pm Breakout Session:
**Global Private Equity –
Thoughts & Considerations**
Steven R. Pines, Senior Vice President
Portfolio Advisors, LLC

Christopher T. Ruder, Managing Director
Portfolio Advisors, LLC

**Mental Health...Out of the Shadows and
Onto the Balance Sheet**
Sean Slater, Executive Vice President
Sales & Marketing, Homewood Health Inc.

Breakout Sessions Sponsored by:

THE
Great-West Life
ASSURANCE  COMPANY

Refreshment Break Sponsored by:

2:30-3:00 pm Refreshment Break

AON Hewitt

3:00-4:00 pm **Authentic Leadership**
Jeff Stusek
President and Chief Executive Officer
Information Services Corporation

Plenary sponsored by:

 SASKATCHEWAN
BLUE CROSS[®]

4:00 pm Closing Remarks

4:00-6:00 pm **Wine and Cheese Networking & Member Appreciation Event**

6:15 pm **The Total Ex'Beer'ience – Conference Delegates Dinner**



Thursday, April 10, 2014

- 8:00-8:45 am Registration
 8:00-8:45 am Breakfast
 8:45-9:00 am Opening Remarks
-

9:00-10:30 am **Panel Discussion:
 Corporate Social Responsibility: Insight, Implement, Adhere**

Moderator: *Joe Hornyak*, Executive Editor
 Benefits and Pensions Monitor

Plenary sponsored by:

Panel:
Kim Siddall, AQ Group Solutions
Gerry Wahl, Ampersand Advisory Group
Ryan Pollice, Mercer



- 10:30-10:45 am Refreshment Break

Refreshment Break Sponsored by:



- 10:45-11:45 am Breakout Session:
**Making Investment Monitoring
 More Meaningful**
 Dave Makarchuk, Partner, Mercer

Breakout Sessions Sponsored by:

Optimizing Drug Plan Performance
 Mike Sullivan, President, Cubic Health Inc.



- 11:45-1:15 pm Luncheon with Special Guest Speaker:
Clark Gillies
 Retired Professional Hockey Player and Member of the Hockey Hall of Fame
 Senior Vice President, Hilton Capital Management, LLC

- 1:30-2:30 pm Breakout Session:
DC Funding – Get(ting) it Right!
 Gerry Wahl, Managing Director
 Senior Consultant, Ampersand Advisory Group

Breakout Sessions Sponsored by:

**Voluntary Benefits in Canada –
 What Does the Future Hold?**
 Marilee Mark
 Vice President Market Development
 Group Benefits, Sun Life Financial



CONFERENCE AGENDA

2:30-3:00 pm Refreshment Break

3:00-4:00 pm **Fueling Enthusiasm –
Taking Pride in Your Performance**
Patricia Katz
Optimus Consulting

Plenary sponsored by:

TRIASIIIA

4:00 pm Closing Remarks



PRESENTATION DESCRIPTIONS

● **Sustainability – A Key Component to a Healthy Corporate Culture**
Wednesday, April 9, 2014, 9:00-10:00 am

Kathy Bardswick

President and Chief Executive Officer, The Co-operators Group Limited

Saskatchewan has many reasons to celebrate, one being the momentum it is experiencing attracting new residents and businesses to the province. How can a commitment to sustainable business practices maintain this momentum?

Kathy will share her perspectives on what she believes are core ingredients for a sought after and healthy corporate culture, paying particular attention to the role a genuine and bone deep commitment to sustainability plays in attracting young leaders. She will share some of the challenges and benefits The Co-operators has experienced on its journey.

● **Defined Benefit Plans – Are They Sustainable?**
Wednesday, April 9, 2014, 10:15-11:15 am

Leah Fichter

Director, Pensions Division, Financial and Consumer Affairs Authority of Saskatchewan

Hardly a day goes by where defined benefit pension plans are not front page in the newspapers. This presentation will provide you with a snapshot of the financial status of defined benefit plans registered in Saskatchewan. Are things as bad in Saskatchewan as they are elsewhere in the country? This snapshot will prove that there are problems with our pension plans. Information regarding actions taken to address the problems will be provided, including actions of the government as well as of pension plan sponsors. Benefit reductions, target benefit plans, and regulatory changes will be discussed.

● **Driving Better Benefits Performance Through Organizational Health**
Wednesday, April 9, 2014, 10:15-11:15 am

Kim Siddall

Principal, AQ Group Solutions

Managing employee health is a critical piece of an overall benefits management and wellness strategy. This session will present a more strategic approach to plan management and design, and provide participants with tactical strategies they can take back to their organizations and apply to their own programs for long term sustainable cost savings.

● **Global Private Equity – Thoughts & Considerations**
Wednesday, April 9, 2014, 1:30-2:30 pm

Steven R. Pines, Senior Vice President, Portfolio Advisors, LLC

Christopher T. Ruder, Managing Director, Portfolio Advisors, LLC

This presentation will focus on the current macro environment for private equity within North America, Europe and Asia as well as the mechanics around the implementation of a private equity program for institutional investors.



● **Mental Health...Out of the Shadows and Onto the Balance Sheet**

Wednesday, April 9, 2014, 1:30-2:30 pm

Sean Slater, Executive Vice President, Sales and Marketing, Homewood Health Inc.

It's 2014 and most companies offer some kind of psychological support to employees and their family members. Thirty years ago, when the Employee Assistance Program (EAP) began its march toward becoming commonplace in organizations, its purpose was clear: to support organizations and employees in dealing with substance abuse and addictions issues and provide some level of support for what would later become known as 'mental health' issues. But the EAP stood alone. In the last ten years, EAP offerings have expanded well beyond the original intent of these types of programs. Today, with mental health related absence and disability costs skyrocketing, and with the issue of mental health emerging from the shadows, employers and organizations have the opportunity to challenge their EAP providers to return mental health to the forefront; to provide services, interventions, data and analysis that address mental health concerns in an integrated, collaborative way that engages all stakeholders in the employee and organizational health equation.

Sean will discuss strategies and approaches for making the best use of your mental health investment by targeting it toward strategies that address the full continuum of current and emerging cost-driving issues.

● **Authentic Leadership**

Wednesday, April 9, 2014, 3:00-4:00 pm

Jeff Stusek, President and CEO, Information Services Corporation

Jeff will discuss the value of leading authentically in today's business world. He will approach the topic of leadership from a practical point of view and actually challenge some of the leadership and management principles many of us have learned over the years. Jeff will bring his real-life experience in leading public sector organizations as well as experience in the private sector as the Chief Executive Officer of the publicly traded company, Information Services Corporation.

This session will be interactive and will give you some perspective that you can immediately take back to your workplace and more importantly into your personal life.

● **Panel Discussion:**

Corporate Social Responsibility: Insight, Implement, Adhere

Thursday, April 10, 2014, 9:00-10:30 am

Moderator: **Joe Hornyak**, Executive Editor, Benefits and Pensions Monitor

Panel: **Kim Siddall**, Principal, AQ Group Solutions

Gerry Wahl, Managing Director, Senior Consultant, Ampersand Advisory Group

Ryan Pollice, Senior Associate, Mercer

Many organizations are taking the lead in their development of policies on socially responsible investing. But can a social responsibility policy translate to other aspects of our business such as our benefit plans? The panel will share thought-provoking insights about developing a social responsibility policy and how this policy can reflect organizational values that can be applied to all aspects of management and governance.



● Making Investment Monitoring More Meaningful

Thursday, April 10, 2014, 10:45-11:45 am

Dave Makarchuk, Partner, Mercer

This session will discuss:

- Why investment monitoring is an important part of the investment governance framework;
- What plan sponsors, and plan members, should be looking for during the monitoring process;
- Advantages and disadvantages of different approaches to investment monitoring;
- The key questions you should ask, and the metrics you should monitor;
- Some suggestions for making investment monitoring more meaningful for you and your plan stakeholders.

● Optimizing Drug Plan Performance

Thursday, April 10, 2014, 10:45-11:45 am

Mike Sullivan, President, Cubic Health Inc.

In recent years, many plans have seen significant reduction in their cost trends within the drug benefit plan. This flattening of the cost curve has been driven by enhanced coordination of benefits, substantial generic drug price decreases and the continued erosion of pipeline and current product line of more expensive brand name medications.

While lower cost trends would seem to equate to better overall plan performance; that is often not the case. For plan sponsors and advisors looking to find ways to sustain better performance and protect against spikes in plan spending moving forward, there are significant opportunities to optimize plan performance without adversely impacting plan members.

This presentation will focus on those opportunities, and provide insight into where plans can reinvest savings to produce a greater return on investment and a better plan for both plan sponsors and plan members.

● DC Funding – Get(ting) it Right!

Thursday, April 10, 2014, 1:30-2:30 pm

Gerry Wahl, Managing Director, Senior Consultant, Ampersand Advisory Group

Funding is critical in all pension programs. Actuaries use a logical probabilistic approach for each member in Defined Benefit plans however funding is largely ignored in Defined Contribution plans by sponsors and record keepers. Sponsors often see funding as primarily a cost issue; record keepers continue the focus on return performance while members simply do not appreciate the impact of funding. In this session, key fiduciary and funding issues and risk for sponsors and plan members will be highlighted. In addition, the impact of fees and the issue of longevity, both critical factors with respect to funding, will be reviewed.



● **Voluntary Benefits in Canada – What Does the Future Hold?**

Thursday, April 10, 2014, 1:30-2:30 pm

Marilee Mark, Vice President Market Development, Group Benefits, Sun Life Financial

Employee paid benefits are certainly not new in Canada, although the offering has been somewhat narrow, focusing on traditional optional benefits such as Life, AD&D, Critical Illness (CI) and Long Term Care (LTC). The take-up has certainly not been overwhelming. Is the past a predictor of the future in voluntary or optional benefits, or can we expect the trend to be different in the years ahead? This session will provide an update on the recent history of voluntary benefits in Canada and start the conversation on future opportunities by addressing questions such as:

- What voluntary benefits hold the greatest interest for Plan Members?
- Will US Healthcare reform and growth in Benefit Exchanges have any impact on trends in Canada?
- What are the most effective means of engaging plan members in understanding and selecting voluntary benefits?

● **Fueling Enthusiasm – Taking Pride in Your Performance**

Thursday, April 10, 2014, 3:00-4:00 pm

Patricia Katz, Optimus Consulting

Recognition and celebration are more than just the icing on the cake. When encouragement flows freely, relationships flourish, and results follow.

Connecting to purpose is key. Seeing that both your character (who you are) and your actions (what you do) matter, fuels commitment and enthusiasm. Sharing appreciation in ways that others 'get it' builds confidence. Celebrating your own success energizes everyone.

Pat will show us how building and sustaining an appreciative, purposeful workplace impacts engagement, wellness, and productivity in positive and enduring ways.



SPEAKER BIOGRAPHIES

 **Kathy Bardswick**
President and Chief Executive Officer, The Co-operators Group Limited



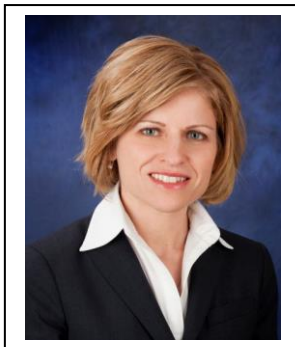
Kathy Bardswick began her career with The Co-operators in 1978. Prior to her appointment as President and Chief Executive Officer of The Co-operators Group on March 1, 2002, Kathy served as Chief Operating Officer of The Sovereign General and L'Union Canadienne. From 1998-2002, she was in charge of operations for these companies and their subsidiaries under the umbrella of The Co-operators Group Limited.

A graduate of McMaster University's M.B.A. program, Kathy also holds a Bachelor of Science degree in Mathematics from the University of Manitoba.

Kathy is a member of the Canadian Council of Chief Executives. She is Chairperson of the Institute for Catastrophic Loss Reduction. Equally active in the co-operative sector, Kathy served as Chair of the International Cooperative and Mutual Insurance Federation (ICMIF). She is currently a member of the ICMIF Executive. She is also a board member of the International Co-operative Alliance (ICA).

Kathy is a board member of Addenda Capital Inc. She has provided leadership to The Conference Board of Canada as a member of the board and executive committee. Kathy also served as Vice-Chair of the University of Guelph's Board of Governors.

 **Leah Fichter**
Director, Pensions Division, Financial and Consumer Affairs Authority of Saskatchewan



After earning a Bachelor of Commerce from the University of Saskatchewan, Leah Fichter began her career as an investment advisor. She then moved into the field of pensions, and went on to become Director of Pensions for a large, public sector defined benefit plan. She also worked as a third party pension administrator for a large insurance company.

Leah then moved behind the scenes to serve in several regulatory roles within the public service: Deputy Director of Registration in Financial and Consumer Affairs Authority of Saskatchewan's (FCAA) Securities Division, Manager of Registration for Saskatchewan Liquor and Gaming Authority, and since 2008, Director of Pensions for FCAA. In 2012, she was appointed as the province's Deputy Superintendent of Pensions.

In her role at FCAA, Leah is responsible for over-seeing the regulation of occupational pension plans in Saskatchewan and is spearheading the development, implementation and administration of the legislative scheme for regulating pooled registered pension plans.

Over the years, she has also earned a Pension Plan Administration Certificate from Humber College and has completed the Canadian Securities Course and Canadian Options Course.

Actively involved in the Canadian Association of Pension Supervisory Authorities, Leah serves on several committees that aim to simplify and harmonize pension regulation across Canada. As well, she is a frequent speaker at pension conferences.





Kim Siddall
Principal, AQ Group Solutions



Kim has worked in the insurance and benefits consulting industry for more than 20 years, with roles in underwriting, product portfolio management, product design and consulting. She joined AQ Group Solutions in 2009 as a Principal of the firm where she specializes in client relationship management, strategic plan design, organizational health and wellness, drug plan management, global benefits management and communications. She serves on the National Board of CPBI as the Director of Manitoba, and is also the organization's National Program Chair. Kim is a contributor to Benefits Canada as a member of their Expert Panel, and is the Vice-Chair of the Misericordia Health Centre Foundation Board in Winnipeg.



Jon Montgomery
Host of *The Amazing Race Canada* and Olympic Gold Medalist



Jon Montgomery delighted Canadians by winning Gold in Men's Skeleton at the Vancouver 2010 Olympics. Now, as host of *The Amazing Race Canada*, he is a charming ambassador for our country's most beautiful sights. Whether he's in snowy Nunavut, on a lentil farm in Saskatchewan, or on stage presenting a keynote speech, Montgomery is genuinely funny and always inspiring.

Proudly Canadian, Jon Montgomery says that being the host of *The Amazing Race Canada* has given him an even greater appreciation for the country. "I already had a profound sense I was a lucky man to be Canadian, but doing this show, you get to meet other Canadians, you get to see how they interact with the racers and a sense of commonality amongst the people." *The Amazing Race Canada* will be back for a second season airing summer 2014.

In February 2009, Montgomery won the Whistler World Cup, which served as the test event for the Vancouver Olympics. At that time, he called the victory the highlight of his career, adding that it was especially meaningful to win at home in front of family and friends. But what he really yearned for was Olympic gold. At the 2010 Olympics, he defended his home track once more, but this time, he did it in front of the world. The now infamous video of Montgomery chugging a pitcher of beer while walking through the streets of Whistler surrounded by screaming fans is sure to go down in Canadian lore.

It was Montgomery's natural curiosity that launched his Skeleton career. Wandering through Calgary Olympic Park years ago, he saw a Skeleton racer whip by at top speed. Fearing it was a Luge accident, he inquired as to what the sport was all about at the visitor's centre. He immediately signed up for a "discover session" and began his long journey to Olympic gold. He won his first World Cup event in January 2008, and also won a silver medal at the World Championships that same year, finishing the season ranked second overall on the World Cup. Some called it quick success, but Montgomery sees things differently. He's been sliding since 2002, but didn't experience his first win until the 2007/2008 World Cup tour. As he says: "I had my butt handed to me on countless occasions when I first started."



Steven R. Pines
Senior Vice President, Portfolio Advisors, LLC



Steve is a Senior Vice President of Portfolio Advisors overseeing investor relations activities for institutional investors throughout Western Canada and the Western US. Steve also serves as a supporting member on the Investment Committee for several Portfolio Advisors funds. Steve joined Portfolio Advisors in January of 2013. Previously, he was Director of Institutional Sales at Davidson Investment Advisors, a Pacific Northwest-based boutique asset management firm. Prior to joining Davidson in 2009, Steve spent nine years at The Northern Trust Company in Chicago advising public pension funds throughout the US and Canada on matters from investment policy design and implementation to risk assessment. Additional positions held included marketing/client servicing roles at Lehman Brothers Asset Management, CRA Rogers Casey and Salomon Smith Barney.

Steve has published several articles including, "Corporates Provide Strength in Today's Bond Environment" (Benefits and Pensions Monitor. April, 2009) and "Good Policy." (Benefits Canada. September, 2008). Steve holds an MBA in Finance from DePaul University in Chicago and a BA in Communication Research from the University of Wisconsin in Madison.

Christopher T. Ruder
Managing Director, Portfolio Advisors, LLC



Chris is a Managing Director of Portfolio Advisors and serves as a voting member on the Investment Committee of several Portfolio Advisors funds. Chris has been with Portfolio Advisors since 2005 and serves as a key member of its primary and secondary investment research and diligence teams, particularly with respect to investments in the Asia Pacific region. Previously, he was a Director at Deutsche Bank, where he was responsible for the structuring of its third party private equity investment products, including the securitization of its private equity fund portfolio and the launch of regional private equity funds focused on investment activities in the Middle East. Prior to joining Deutsche Bank, Chris worked as an attorney for Bryan Cave LLP in the United Kingdom and Saudi Arabia, where he advised American, European and Middle Eastern corporate and institutional investors on

joint venture, merger and other private market activities in Europe and the Middle East. Chris has served as a director of the Jordan Fund and has served or is serving as an Advisory Board member of three private equity partnerships. Chris holds a B.A. from Princeton University and a J.D./M.B.A. from St. Louis University.

Sean Slater
Executive Vice President, Sales and Marketing, Homewood Health Inc.



Sean Slater is the Executive Vice President of Sales and Marketing with Homewood Health. In his role, Sean is responsible for providing leadership in the development and execution of market and customer strategies across all segments, including the Homewood Health Centre, Employee Health and Organizational Support Services and Return to Work Services. He leads teams that have responsibility for customer service, marketing and communications, and business development.

To his role, Sean brings 15 years of varied experiences gained from senior leadership roles in the Employee Assistance Program (EAP), Wellness, Disability and Employer Services industries. Sean has led teams responsible for integrating and bundling multiple complementary services and products designed to help customer organizations become more efficient, healthy and profitable. His focus has been on supporting customers, clients, insurers and partners in understanding their data, identifying their areas of opportunity, and building solutions that deliver return for the customer and the organization.





Jeff Stusek

President and Chief Executive Officer, Information Services Corporation



Jeff Stusek was appointed President and Chief Executive Officer of Information Services Corporation (ISC) on July 1, 2008.

Jeff spent 13 years with the city of Regina in various leadership capacities including three years as Director of Transit.

He brought a customer focus to ISC but knew the business would not be successful without appropriate attention to its people. He is committed to increasing employee engagement and building cultural alignment with all staff. With a focus on the financial sustainability of the organization, he is moving ISC beyond satisfaction to excellence.

Under his leadership, ISC has achieved recognition for its work including achieving Excellence Canada's Level 4 certification in the Excellence, Innovation and Wellness Standard, and the Platinum Canada Award for Excellence and being named by Mediacorp as one of Saskatchewan's Top 20 Employers, one of Canada's Best Diversity Employers, Canada's Greenest Employers, and Canada's Top Employers for Young People.

In 2013, Mr. Stusek was named one of Saskatchewan's 10 "Men of Influence" by SaskBusiness magazine. An active member of his community, Mr. Stusek was elected to the Saskatchewan Roughriders Board of Directors in June 2010 and is the former Cabinet Director for the United Way.

He holds a Bachelor of Administration degree and a Master of Business Administration degree from the University of Regina. He is married with two sons.



Joe Hornyak

Executive Editor, Benefits and Pensions Monitor

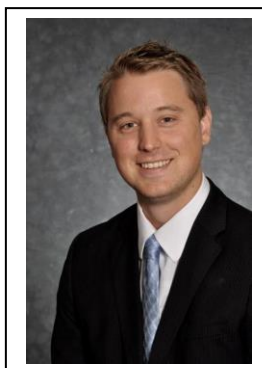


Joe Hornyak is the Executive Editor of Benefits and Pensions Monitor. A graduate of Ryerson Polytechnical Institute with a bachelor of applied arts degree in journalism, Joe spent a number of years as an editor for newspapers in the Thomson Newspaper chain. He joined Benefits and Pensions Monitor in 1997.



Ryan Pollice

Senior Associate, Mercer



Ryan Pollice is a Senior Associate at Mercer and member of Mercer's Responsible Investment team based in Toronto. He supports clients focused on incorporating environmental, social and governance ("ESG") factors in their investment decision-making processes.

Ryan joined Mercer in March 2011. Prior to this, Ryan worked at the London-based 'Principles for Responsible Investment', a United Nations-backed initiative that has been endorsed by more than 1100 institutional investors representing more than \$30 trillion in assets under management.

Ryan holds a Master of Environment and Resource Studies from the University of Waterloo.



 **Dave Makarchuk**
Partner, Mercer



Dave Makarchuk is a Partner in Mercer's Investment Business. He is responsible for leading the development and execution of Mercer's growth strategy for its Canadian Investment Business. He also leads the Western Canadian investment consulting business and is a member of the national investment leadership team.

Dave combines his actuarial and investment expertise to advise plan sponsors on setting investment policy, resolving asset/liability issues, enhancing investment structures and selecting and evaluating investment managers. Dave advises sponsors of both defined benefit and defined contribution plans as well as a variety of non-pension institutional funds. Most of Dave's clients have assets in excess of C\$1Billion.

Dave joined Mercer in 1999. Dave graduated from the University of Calgary in 1992 with a Bachelor of Science (Actuarial Science) and a Bachelor of Commerce (Finance). He is a Fellow of the Canadian Institute of Actuaries and of the Society of Actuaries and is a CFA charter holder.

 **Mike Sullivan**
President, Cubic Health Inc.



Mike Sullivan co-founded Cubic Health Inc. in 2003, and currently serves as the company's President. Cubic Health is an independent health plan analytics and prescription drug plan management company based in Toronto. Cubic Health works with Canadian employers, plan advisors, provincial/territorial governments, insurance carriers, plan administrators, and service providers to optimize investments made in employee health benefits. In addition to its primary focus on health plan analytics, Cubic Health manages customized drug formularies for its clients, maintains a comprehensive database of over 72,000 drug products in Canada, and manages patient access to medication through its Cubic Health Clinical Review Panel.

Mike began his career as a community pharmacist in Saskatoon, and has previous experience working in the pharmaceutical and benefits consulting industries. He continues to maintain an active license to practice with the Ontario College of Pharmacists, and previously served on the Board of Directors of the Ontario Pharmacists' Association.

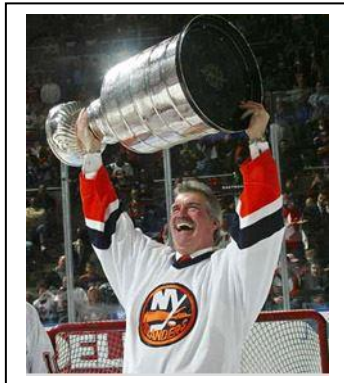
Mike has extensive experience speaking across Canada and internationally on topics related to drug plan management, the prescription drug pipeline and third-party payers. He is a member of Benefits Canada's Online Expert Panel, and serves as an Adjunct Professor at the University of Waterloo where he teaches in the areas of Personal & New Venture Financial Management.

Mike graduated from the College of Pharmacy at the University of Saskatchewan, and completed his Master of Business Administration degree from the Schulich School of Business at York University where he specialized in Finance.



Clark Gillies

Retired Professional Hockey Player and Member of the Hockey Hall of Fame
Senior Vice President, Hilton Capital Management, LLC



Clark Gillies was born and raised in Moose Jaw, Saskatchewan. He played junior hockey for the Regina Pats (WHL) where he had three very solid seasons, collecting 79, 92 and 112 points. His last season culminated in a Memorial Cup win, the championship of junior hockey.

What Clark developed in Regina was confidence. Clark also went on to be a massive 6-foot-3 and 215 pounds. His size, toughness and leadership qualities prompted the New York Islanders to draft him 4th overall in the 1974 entry draft.

Clark immediately made an impact in the NHL and quickly blossomed into a key player in the Islanders' quest for the Stanley Cup. In the late 1970s and early 80s he was one of NHL's premier left wingers and was a 1st team All-Star in 1978 and 79. He was also the MVP in the 1979 Challenge Cup series vs. the Soviets.

For many years, Clark played on the so-called "Long Island Lighting Company" line. His original line mates on that line were Bryan Trottier and Billy Harris who was later replaced by Mike Bossy. The trio of Gillies-Trottier-Bossy couldn't be stopped on most nights and struck fear into opponents. Clark always used his size and strength to his advantage while Bossy and Trottier conducted their magic with the puck.

Clark was also a great leader, and a proud member of the NHL captain's fraternity. Clark was only 22 years old when he was selected to replace 36-year old veteran Ed Westfall as a captain on February 3, 1977.

Clark played for the Islanders until 1986 and led them to four consecutive Stanley Cups. He was a vital part of the Islanders' machinery and a great fan favorite. In 1986, the Islanders exposed Clark in the waiver draft. He was picked up by the Buffalo Sabres and played two more years for the Sabres before hanging 'em up in 1988. He retired with 958 games under his belt, and 319 goals, 378 assists and 697 points in his pocket. More importantly, he has four Stanley Cup rings on his fingers, thanks in large part to his 94 points in 164 playoff games. Clark was elected to the Hockey Hall of Fame in 2002.

Today, Mr. Gillies is involved in the Sales and Marketing functions for Hilton Capital Management, LLC where he joined in 2009. Prior to joining Hilton, Mr. Gillies spent 15 years as a Senior Financial Advisor at Raymond James where he founded a franchise in 1994. He began his career with Smith Barney in 1990.

Gerry Wahl, B.Comm (Actuarial Science), CMA, MBA

Managing Director, Senior Consultant, Ampersand Advisory Group



Gerry Wahl has a unique financial background (accounting, taxation, treasury, pension administration). He has been responsible for major systems and business re-engineering corporate projects and working with small businesses. He has hands on experience as a CRA business auditor, mine controller and assistant treasurer for Teck Cominco and treasurer for Teck Cominco Alaska Inc. As assistant treasurer Gerry was the Investment Manager for Teck's global pension programs (assets ~\$2billion) responsible for developing and monitoring the pension governance framework. He also served on many pension and charitable boards and committees. Currently setting up effective pension governance frameworks and reporting structure are Gerry's main focus. He also does pension seminars for the CMAs, CGAs, CPAs, Federated Press, and, has published

articles on a variety of pension issues. He is a member of the Financial Executive Institute pension committee and has been actively involved in pension reform in Canada.





Marilee Mark

Vice President Market Development, Group Benefits, Sun Life Financial



Marilee joined Sun Life in 2013, bringing over 25 years of experience in the industry including disability management, consulting, and product and business development. In her current role she is accountable for the development and execution of Sun Life Financial's Group Benefit market strategies, including communications and the extension of their product and service offering.

She has been extensively involved in the industry and sits on a number of external advisory boards, including the Benefits Canada Advisory Board and the Partners for Mental Health Workplace Action Team.



Patricia Katz

Optimus Consulting



In over twenty five years as a speaker and consultant, Patricia Katz of Optimus Consulting has inspired tens of thousands of people to accomplish what matters most in ways that bring more peace of mind. By reducing the impact of overload and overwhelm in the workplace, Pat works with leaders and organizations to generate stronger results, deepen engagement, and create a more satisfying work and life experience for all.

Pat is the bestselling author of five books on balance and productivity. She also writes Pause, a weekly online newsletter enjoyed by over 5000 subscribers. Her creative pursuits also include watercolor painting, and she recently published a new art book titled Sketches of Saskatoon.

Pat is a Certified Human Resource Professional. She holds a Masters in Continuing Education, and was recently inducted into the Canadian Speaking Hall of Fame. She has served in many executive leadership roles in regional, provincial and national professional associations.



NETWORKING OPPORTUNITIES

● Wine and Cheese Networking & Member Appreciation Event

Wednesday, April 9, 2014, 4:00-6:00 pm
Blue Lounge, Hotel Saskatchewan

CPBI Saskatchewan Regional Council values the support of our members and our conference delegates. As a Council, we are pleased to sponsor this event as our Thank-you to all those in attendance. Please join us for socializing and refreshments as we celebrate another successful year in Saskatchewan.

● The Total Ex'Beer'ience – Conference Delegates Dinner

Prior registration required.

Wednesday, April 9, 2014, 6:15 pm
Beer Bros. Gastropub & Deli, 1821 Scarth Street, Regina

The ultimate way to immerse yourself in a unique dining ex'beer'ience! Beer Bros. has crafted a five-course menu for the dining pleasure of CPBI SK Regional Conference guests. Their beer steward will pair each course with a sample of beer chosen to complement each dish perfectly. The cost for this event is \$75 +GST per person. (The cost of this event is not included in the conference registration fee. Prior registration is required.) Please join us for an evening of great food, great company, and great fun.

