



Benefits, Beyond the Basics

March 1 & 2, 2017 – Double Tree by Hilton, Regina

Join us for a full program addressing in-depth aspects of Group Benefits Plans, current trends and emerging issues. This 2-day seminar will provide a comprehensive framework that will enhance your understanding of benefits, act as a primer for the CEBS program, and offer valuable continuing education credits for the Insurance Council of Saskatchewan. This is also an excellent opportunity to network with fellow participants and event speakers. Attendees will receive a binder of presentation material and certificate of completion.

AGENDA

Wednesday, March 1, 2017

9:30-9:50am

Registration, Muffins and Refreshments

9:50-10:00am

Opening Remarks

10:00-11:30am

Session 1: Roles and Responsibilities

This session examines the roles and responsibilities of insurance carriers, employers, and employees. You will be provided with information on what your rights and expectations are as the policyholder, administrator, employee. Focus will be on what's in (or not included in) the insurance contract and why those provisions are there. This presentation will set the stage for the rest of the seminar.

Speaker: Alana Shearer-Kleefeld, Director, Employee Benefits, 3sHealth

11:30-12:30pm

Lunch

12:30-2:00pm

Session 2: Claims Administration

This session provides an overview of Claims Administration for all product lines: Life Insurance, Short/Long Term Disability, and Health and Dental. What happens when a plan member makes a claim? What technological advances have been made? How can claim administration be made more efficient? The session will also outline the plan member's experience; the plan sponsor's expectations; who is paid and when; and how carriers protect the future of the plan and control costs.

Speakers:

Shelley Hubble, Regional Manager, Regina Disability Management Services Office, Great-West Life

Dan Bolan, Account Executive, Saskatchewan Group Sales and Service Office, Great-West Life

2:00-2:30pm

Refreshment Break

2:30-4:00pm

Session 3: Flex Benefits: The Past, Present & Future

This session will focus on the fundamentals of flexible benefits including details on considerations in the design, administration and pricing of flexible arrangements. The session will include a discussion on an array of design options in adding flexibility to a plan, including flexible spending accounts, modular plans and cafeteria style plans.

Speaker: Tyler Bergh, Director, Business Development (Prairies Region), Sun Life Financial

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Thursday, March 2, 2017

8:15-8:45am

Breakfast

8:45-10:15am

Session 4: Funding

How are premiums set? What is the role of a group's experience rating? How is a plan's cash flow monitored? How is the insurance company selected? What criteria should be employed? When should the plan sponsor self-insure? This session examines these and other issues relating to the financial management of benefits plans.

Speaker: **Bud Anderson**, Retired Director, Employee Benefits, 3sHealth

10:15-10:45am

Refreshment Break

10:45-12:15

Session 5: Emerging Issues

Absenteeism, presentism, mobile technology, wellness programs, millennials, managed drug formularies... the buzz words surround us. But what does that mean for the world of benefits? Are we headed for a benefit meltdown or what will the next 5 years bring? This provocative session will kick start your thinking as we look into the future.

Speaker: **Jenny Hart**, Corporate Account Executive, Blackstone Insurance, Benefits and Bonding

12:15-1:15pm

Lunch

1:15-2:45pm

Session 6: Total Compensation/Total Rewards

What are total rewards and why they are important to organizations? This presentation will answer these questions, explore the types of total rewards models, and discuss how to implement a program that aligns with market conditions.

Speaker: **Shannan Corey**, Director, Total Rewards, Human Resources, Federated Co-operatives Limited

2:45-3:00pm

Closing Remarks

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SPEAKER BIOGRAPHIES

Alana Shearer-Kleefeld

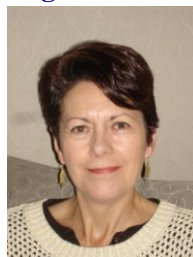
Manager, Benefits Administration, 3sHealth



Alana Shearer-Kleefeld recently became Director of Employee Benefits at Health Shared Services Saskatchewan (3sHealth). After three and a half years of managing the group business development for Manitoba and Saskatchewan at The Co-operators (2010-2014), Alana returned to the employee benefits area at 3sHealth as Manager of Benefits Administration, where she led a benefits administration team supporting the healthcare industry in Saskatchewan. Prior to joining 3sHealth in 2004 (formerly the Saskatchewan Association of Health Organizations), Alana worked for several insurance companies including Crown Life, Canada Life, Great West Life and Confederation Life. Alana has been a CPBI Member since 2006, and joined the Saskatchewan Regional Council the very same year; that's dedication for you! Since joining Council, Alana has filled a variety of roles including: Executive Secretary, Chairperson of several committees within Council including two terms as the Saskatchewan Regional Conference Chair, member of a variety of National Council committees, two terms as the Saskatchewan Regional Council Vice-Chair, and currently, Saskatchewan Regional Council Chair. Through her years of being involved in CPBI, both at the regional and national levels, and along with her desire to give back to the benefits community, Alana brings a unique perspective and commitment to supporting the Council in providing high-quality and professional education events in the region.

Shelley Hubble

Regional Manager, Regina Disability Management Services Office, Great-West Life



Shelley Hubble (FLMI, FLHC) is Regional Manager for the Regina Disability Management Services Office at Great-West Life. Shelley is in her 20th year working in the field of disability claims management, and has worked in various areas of group insurance for a total of 28 years.

Dan Bolan

Account Executive, Saskatchewan Group Sales and Service Office, Great-West Life



Dan Bolan is an Account Executive in the Saskatchewan Group Sales and Service Office for Great-West Life. Dan has 18 years of experience in the group benefits industry and works with medium-sized to large employers in the province of Saskatchewan. Dan has his Bachelor of Commerce degree in Risk Management and Insurance and achieved the Certified Employee Benefits Specialists (CEBS) designation in 2005. He was past tournament management chair for the Great-West Life Charity Golf Classic benefiting the Hospitals of Regina Foundation and is currently a council member for CPBI Saskatchewan.

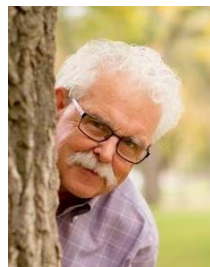
Tyler Bergh
Director, Business Development (Prairies Region), Sun Life Financial



As Director of Business Development, Tyler Bergh leads the sales and service teams in the Prairies Region (Calgary, Regina and Winnipeg) for Sun Life Financial. In overseeing the team's management of their accounts, Tyler is responsible for promoting strong relationships with our customers and their advisors, and for ensuring we deliver exemplary service throughout the life of each plan.

Tyler joined Sun Life in 2002 and brings to his role 15 years of group benefits experience, including account management, underwriting and financial analysis. He holds a Bachelor of Commerce from the University of Calgary, specializing in risk management and insurance, and a Certified Employee Benefits Specialist (CEBS) designation.

Bud Anderson
Retired Director, Employee Benefits, 3sHealth



Bud Anderson has over 30 years of experience in the employee benefits field which includes underwriting, pricing, benefits administration, and disability management. Bud recently retired as the Director of Employee Benefits at 3sHealth. 3sHealth provides employee benefits to 42,000 healthcare employees in Saskatchewan. Although the pricing structure and underwriting for a group the size of 3sHealth is quite different, Bud has also worked with two large consulting firms and was also an Assistant Vice-President of Group Claims with an international Insurer.

Jenny Hart
Corporate Account Executive, Blackstone Insurance, Benefits and Bonding



Jenny Hart is a Corporate Account Executive with Blackstone Insurance, Benefits and Bonding in Regina. Since 2001, she has been working in the insurance industry with a strong focus in the areas of Group Benefits and Group Retirement Savings. From wholesaling, to advising and consulting, Jenny has worked with clients all across Canada and in a vast number of business sectors. She is happy to share her knowledge and experience with you.

Shannan Corey
Director, Total Rewards, Human Resources, Federated Co-operatives Limited



Shannan Corey has been the Director of Total Rewards at Federated Co-operatives Ltd. since August 2015. Shannan is responsible for providing leadership to the Co-operative Retailing System in the development and delivery of a comprehensive total rewards program in support of our overall Talent Management strategies. This includes overseeing the implementation and administration of various strategic total rewards offerings including compensation, group benefits, pension plans and recognition programs for approximately 25,000 employees across both the wholesale (FCL) and retail (CRS) sides of the organization. Shannan was previously in consulting for 28 years, including four years with Koenig and Associates in Saskatoon in various roles as a compensation consultant as well as 24 years with Aon Hewitt in Saskatoon in various roles as a pension consultant. Shannan has a Bachelor of Science degree in Mathematics and Statistics from the University of Saskatchewan, a CPHR (Certified Professional Human Resources) designation, as well as possessing her accreditation as an Associate Pension Actuary.