

# No Plan is an Island



15th Anniversary

## 2019 CPBI Atlantic Regional Conference

October 2 - 4 • Delta Prince Edward • Charlottetown, PEI

Thunder Cove Beach, PEI

## 2019 CONFERENCE COMMITTEE

### Co-chairs

Steve Cameron, Medavie Blue Cross  
David Tutty, Manulife Financial

### Committee

Carolyn Roberts, Province of New Brunswick  
David Harding, Industrial Alliance  
Jeff Alexander, Morneau Shepell  
Jennifer Urquhart, Eckler Ltd.  
Kevin Hollis, Belmont Health & Wealth  
Megan Gee, University of Prince Edward Island  
Tara Anstey, Mercer  
Ron Cashin, Desjardins Insurance  
Virginia Wickstrom, University of Prince Edward Island

### Conference Volunteers

Kimberly Reynolds, Medavie Blue Cross  
Theresa Rose, Green Shield  
Scott Sparks, Village of New Maryland

# No Plan is an Island

## Wednesday, October 2nd

TIME	EVENT	LOCATION
10:00 am - 6:00 pm	Registration	Delta Foyer
11:00 am - 5:00 pm	Golf	Glasgow Hills Golf Course
12:30 pm - 4:45 pm	Hop, Sip & Swirl Tour	Island Honey Wine Company, Deep Roots Distillery and Upstreet Craft Brewing
6:00 pm - 7:00 pm	Reception	Convention Foyer
7:00 pm	Lobster Dinner & Entertainment Featuring The Sentimentalists	Palmer Pope

## Thursday, October 3rd

TIME	EVENT	LOCATION
7:00 am - 8:15 am	Breakfast	Coles
7:30 am - 5:00 pm	Registration Desk	Delta Foyer
8:15 am - 8:30 am	Conference Opening	Sir John A. MacDonald
8:30 am - 9:30 am	Forum A	Sir John A. MacDonald
9:30 am - 9:45 am	Break	Convention Foyer
9:45 am - 10:45 am	Sessions 1 & 2	Gray & Palmer
10:45 am - 11:00 am	Break	Convention Foyer
11:00 am - 12:00 pm	Sessions 3 & 4	Gray & Palmer
12:00 pm - 1:15 pm	Lunch	Coles
1:15 pm - 2:15 pm	Forum B	Sir John A. MacDonald
2:15 pm - 2:30 pm	Break	Convention Foyer
2:30 pm - 3:30 pm	Sessions 5 & 6	Gray & Palmer
3:30 pm - 3:45 pm	Break	Convention Foyer
3:45 pm - 4:45 pm	Sessions 7 & 8	Gray & Palmer
6:15 pm - 7:15 pm	Reception	PEI Brewing Company
7:15 pm	Dinner & Entertainment Featuring Lennie Gallant	PEI Brewing Company
10:15 pm	Late Night Social	The Gahan House & Olde Dublin Pub

## Friday, October 4th

TIME	EVENT	LOCATION
7:00 am - 8:30 am	Breakfast	Coles
7:30 am - 12:00 pm	Registration Desk	Delta Foyer
8:30 am - 8:45 am	AGM	Sir John A. MacDonald
8:45 am - 9:00 am	Closing Remarks	Sir John A. MacDonald
9:00 am - 10:00 am	Forum C	Sir John A. MacDonald
10:00 am - 10:15 am	Break	Convention Foyer
10:15 am - 11:30 am	Forum D (Panel Session)	Sir John A. MacDonald
11:30 am	Lunch	Coles (lunch to go available)



# No Plan is an Island

## FORUM A - THURSDAY MORNING

### **Nik Nanos**

Renowned Pollster, Demographer and Current Affairs Expert

Nik Nanos leads one of Canada's most distinguished research companies. He is the Chairman of Nanos Research, a Global Fellow at the Woodrow Wilson International Center for Scholars in Washington DC, and a research associate professor at the State University of New York at Buffalo. Nik has also been elected a Fellow of the MRIA (FMRIA), the highest professional designation in the marketing research industry in Canada.

A trusted researcher and strategic advisor, Nik is regularly called upon by senior executives to provide counsel on a wide range of issues including corporate mergers, public advocacy campaigns, reputation management and regulatory issues.

In addition to his weekly Nanos Power Index which charts the strength of the federal political parties, Nik leads the team behind the weekly Bloomberg Nanos Canadian Confidence Index, considered a must-have resource for senior executives.

Nik is also featured in a weekly segment on CTV's PowerPlay, Nanos on the Numbers, which focuses on the latest political, business and social trends. He currently serves on the Editorial Board for the Canadian Journal of Professional Communication at McMaster University.



# No Plan is an Island

## FORUM B - THURSDAY AFTERNOON

### David Chilton

Former “Dragon” on CBC TV’s Dragons’ Den and Bestselling Author of *The Wealthy Barber*

Whether it’s helping millions of Canadians achieve personal financial success or investing in low-fat cookbooks, David Chilton has always had a knack for recognizing great ventures, a skill he leveraged as a “dragon” on CBC television’s #1 hit show, *Dragons’ Den*. Called “charming, unpretentious, and funny,” by *The Chicago Sun-Times*, David puts his business expertise and life experience to work in his informative and inspiring talks.

David began his career by self-publishing his book *The Wealthy Barber* in 1989. It was written in 26 months, and was specifically targeted toward those with little investment experience, in order to help them develop positive personal-finance habits. The book has become one of the most popular Canadian books of all time, selling over two million copies since its release.

His second book, also self-published, is *The Wealthy Barber Returns*, and is yet another runaway Canadian bestseller. David is also the publisher of the bestselling cookbooks *Looneyspoons*, *Crazy Plates*, and *Eat, Shrink & Be Merry!* (working with authors Janet and Greta Podleski).

David is an economics graduate from Wilfrid Laurier University, where he won the award for the highest mark in the country on the Canadian Securities Course. He is a frequent guest on national television and radio shows.



# No Plan is an Island

## FORUM C - FRIDAY MORNING

### **Tina Varughese**

Cross-Cultural Communication Expert and Work-Life Balance Advocate

Named one of Canada's 10 Notable Speakers by Ignite Magazine, audiences describe Tina as 'dynamic, highly energetic, relevant and hilarious'. She consistently rates as the 'the best speaker of the conference'. Her interactive approach is insightful yet practical and her delivery is highly entertaining. She breaks down barriers to create a comfortable, inclusive and fun space leaving attendees inspired to think, behave, act or communicate with intention.

Tina is an Indo-Canadian daughter of first generation East Indian parents, which allows her to find 'the best of both worlds' and shed light, knowledge and most importantly universal humour into the intercultural workplace. She draws from her experiences as an entrepreneur, mother, daughter, wife, sister and friend when delivering keynotes on work-life balance and diversity and inclusion-topics which resonate with her both professionally and personally.

For fifteen years Tina Varughese, B.A.; B.Comm, worked with immigrants in her roles with the Province of Alberta's immigration office as well as running her own successful relocation and settlement firm.



# No Plan is an Island

## FORUM D - FRIDAY MORNING

### Political Landscape Panel

What is on the Horizon for Atlantic Canada - A Political and Economic Regional Overview

Don Desserud	Professor, Political Science, University of Prince Edward Island
Mario Levesque	Associate Professor, Politics and International Relations, Mount Allison University
Richard Saillant	Economist and Public Policy Consultant

The Canadian and Atlantic regional political landscape is in a time of transition and change. To what extent are our regional politics being influenced by national and international forces? What effect will these changes have on our region?

Join us as three political and economic experts from Atlantic Canada share their thoughts on this topic. Donald Desserud, Mario Levesque and Richard Saillant will share their perspectives on a number of topics including the continuity of change in the Atlantic Canadian political landscape. They will also explore the consequences of recent provincial and federal elections, the demographic and economic challenges for growth, and the successes and challenges with regional immigration. They will also touch on the impact of the legalization of cannabis on our region.

The panel will give their views on what we as a region need to do going forward. There will be time for Q & A at the end of the session.



# No Plan is an Island

## Session 1

### **CUT THE CRAP: CREATING NUTRITIONAL CONSCIOUSNESS IN THE WORKPLACE**

Dr. Yoni Freedhoff, Bariatric Medical Institute

Dr. Yoni Freedhoff, MD, is a professor, blogger, speaker, proud dad and author of the Diet Fix. He has a website “weightymatters” with the mission to help expose the dark underbelly of the corporate badvertising, ridiculous public policies and the general ne’er do wells of Big Food, nutrition and obesity.

In this session Dr. Yoni will examine what is food science; and explore the linkages of food with chronic disease; chronic pain and mental health. Are we really able to drill health down to specific foods? What are the linkages of diet and weight-related absenteeism and disability? As workplaces focus wellness strategies on physical and mental health, what can employers do to impact nutritional consciousness (dietary) in the workplace without relying on “personal responsibility”. Lastly, what does the new food guide look like – why is this one exciting? And how can the new food guide be used to shape workplace policies?

## Session 2

### **SUSTAINABILITY ≠ ADEQUACY**

Blair Richards, Halifax Port ILA/HEA

Changes in pension plan design in recent decades have largely been driven by issues around sustainability, with a focus on affordability, volatility, liability reduction and options around pension payouts. This session will examine the missing link between contribution levels and the benefits those contributions are expected to provide — an element that isn’t often measured in terms of the adequacy of retirement income, particularly within defined contribution plan models.



# No Plan is an Island

## Session 3

### **BIOLOGIC AND BIOSIMILAR DRUG STRATEGIES: THE POINT/COUNTERPOINT IN CANADA**

Joe Farago, Innovative Medicines Canada  
Kevin O'Connor, Janssen Pharmaceuticals  
Ned Pojskic, Green Shield Canada

As one of the main cost drivers, biologic drugs have become a focus for private drug plans across the country. Plan sponsors are looking to consultants and carriers for guidance and advice, and the different strategies that have emerged as a result. During this session, you will hear from leading experts in the country on these differing views.

Joe Farago will lead the session by taking a look at the biologic marketplace and what new biosimilars are in the pipeline. Kevin O'Connor will examine the history of product listing agreements with private insurers; the difficulty and potential perils of joining government product listing agreements and the current landscape of private insurers negotiating drug prices. Ned Pojskic will examine Canada's progress with biosimilar adoption and what some public/private payors are doing to support their introduction; and he will also discuss why there is such low patient uptake in Canada, and what strategies exist today to increase biosimilar utilization. Eat a big breakfast, this session will dip into lunch – with a moderated question period to follow!

## Session 4

### **THE PSYCHOLOGY OF INVESTING**

Darin Eddy, HRM Pension Plan

Institutional and retail Investors often make decisions that are not in their best interest, relying too much on “gut” feeling, or simply acting on a pattern that they believe to be true. This approach often results in an unsatisfactory outcome, but no corrective action is ever taken.

Join Darin Eddy as he provides insight into the psychology and drivers behind making investment decisions, and decisions under uncertainty generally. This will include unpacking the premise that humans are “narrative creating” machines, and that fact can ultimately influence our decision-making if we are not thoughtful about our processes.

Darin will look at how to navigate around biases, the interaction of the cognitive centres in our brain, how a board or committee might avoid “groupthink”, and how to avoid creating a narrative that doesn't follow the facts.

Attendees will leave with a better sense of how to build processes that protect against our shortcomings, and how to avoid the pitfalls of constructing an incorrect narrative.

# No Plan is an Island

## Session 5

### **THE RISING COSTS OF DENTAL BENEFITS: IT'S TIME FOR A CHECK-UP!**

Joan Weir, Canadian Life and Health Insurance Association (CLHIA)

We spend a lot of time managing drug plans, and for good reason, while the dental spend continues to escalate at an increasing rate. This session will focus on what are the drivers of cost increases in the dental office? What steps can the insurance industry, plan sponsors and benefit plans take to manage this? The session will also provide an overview of the impact of revisions to the general dental coding system on costs. Joan will review the current landscape with respect to dental audits and outline what steps the insurance industry is taking in a number of key areas around fraud.

## Session 6

### **IDENTIFYING AND COMMUNICATING BARRIERS TO CHANGE**

Paul Lai Fatt , Morneau Shepell

We are always talking about change in the pension space – growing challenges, best practice solutions, and innovations to adapt to future realities. But how does change actually happen? When faced with similar challenges, why do we find some plans and jurisdictions changing a lot, some a little, and some not at all? And what lessons have been learned that can be adapted going forward so that plan stakeholders know how to enact change in the future should it be needed?

Join Paul as he takes a practical real-world look at the key elements to driving change in the pension space. Paul will address some of the specific barriers to change, and provide actions that have helped move the needle in his experience.

# No Plan is an Island

## Session 7

### **DIGITAL TECHNOLOGIES: A BETTER TOOLBOX FOR MENTAL HEALTH**

Alex Boucher, Mercer

Rebecca Smith, Medavie Blue Cross

Mental health is emerging as a leading cause of disability in the workplace. Simultaneously, primary health care services are increasingly strained to meet the mental health care needs of employees. New mental health care products offer a bridge to address continuity of care gaps and enhance service delivery. This session will focus on the growing digital mental health marketplace and employer opportunities with respect to disability management.

## Session 8

### **PENSION PLAN TAX AND LEGAL UPDATE**

Kim Ozubko, Miller Thomson LLP

Legislative and regulatory changes and case law developments continue to challenge plan sponsors, trustees and administrators of registered pension plans. This session will provide an update on key legislative and case law developments impacting plan design, governance, funding and plan administration. Learn how these developments impact your plans and how you can mitigate your legal and compliance risk.

# No Plan is an Island

## Entertainment

### **The Sentimentalists - Wednesday, October 2nd**

World-renowned mentalist Mysterion and Steffi Kay team up to create a two-person mind reading experience that is truly breathtaking. Together they showcase their special way of communicating, with a touch of humor and most importantly class. Imagine your thoughts transferred across the room into Steffi's mind with 100 percent accuracy. Your CEO thinks of the name of their favorite film and Mysterion and Steffi are able to divine that movie. Spoons bend with mental powers and drawings are duplicated with telepathy on the spot. For the highlight, The Sentimentalists are able to correctly identify items in the wallets and bags of audience members, so be careful what you think.



The Sentimentalists are members of The Magic Castle in Hollywood CA, tour sold out shows across the US and Canada. The Sentimentalists currently have a program on Bell TV Fibe 1 as well as have appeared on dozens of media appearances on major networks. The Sentimentalists appeared on Penn and Teller's hit show Fool Us and Fooled them, making them the only telepathy duo to do so in the world.

### **Lennie Gallant - Thursday, October 3rd**

Recognized by his peers as one of Canada's best performing songwriters, Lennie Gallant has released twelve albums (10 in English and 2 in French) of original songs which have won him a host of awards and nominations from the JUNOs, Les Prix Eloizes, and The East Coast Music Awards, including 2017 ECMA Entertainer of the Year. He was named Canadian Folk Artist of The Year for 2016 and his song Peter's Dream was voted one of the Top Ten East Coast Songs of All Time.



A recipient of the Order of Canada, Lennie is an international touring artist, who has performed all over the continent, in Europe, for the troops in Afghanistan, and at the XXI Winter Olympics. He has toured with Symphony Nova Scotia, Symphony New Brunswick, and with Symphony PEI. One of his albums, When We Get There, even went up to the international space station with Canadian Astronaut Julie Payette (now the Governor General of Canada) for the crew to enjoy and orbited the planet 248 times. How about that for high rotation! Fresh on the heels of his 2017 ECMA wins Gallant buried himself in the studio with producer Daniel Ledwell (Jenn Grant, David Miles) to record his new album, Time Travel.

### **Late Night Social - Thursday, October 3rd**

Take in the charm of Charlottetown's downtown during our Late Night Social. Local musicians will entertain delegates and their guests while they enjoy local beverages at both the Gahan House and Olde Dublin Pub.



# No Plan is an Island

## Activities

### Conference Golf Tournament

In an area of the country known for its magnificent golf venues, Glasgow Hills stands out on the list of must play Prince Edward Island golf courses and is widely recognized as one of the islands exceptional golf experiences. Dramatic views of the River Clyde and the Gulf of St. Lawrence offer a spectacular setting in which to play. The undulation will challenge you and the beauty of the surroundings will inspire you.

The tournament will be run as a scramble event. The CPBI committee will put individual participants on teams balanced by handicap. All players tee off at 11:00 a.m. sharp. Guests accompanying conference attendees are welcome to play in the tournament.

Transportation will be available to and from the course and you can sign up as part of the conference registration. A limited supply of rental clubs are available by making arrangements directly with the golf club. Contact the Pro Shop at 866-621-2200.



### Hop, Sip & Swirl Tour

On this tour, delegates and guests will savour the distinctive flavours of the terroir found in the central regions of Prince Edward Island.

After seeing the potential for Mead production on Prince Edward Island, mead makers Charles and Laura Lipniki brought their passion with them

to the sunny slopes of Wheatley River, our first stop on your tour, **Island Honey Wine Company**. Their Island Honey Wine will be an exploration of flavour during this memorable tasting & food pairing voyage.

Next stop on your tour we will visit **Deep Roots Distillery**. Island producer Mike Beamish uses quality ingredients locally sourced or found within the orchard. Recognized for their liqueurs, liquors, and award-winning absinthe, there will certainly be something for all palates to enjoy with your food pairing!

Last stop on the tour is at **Upstreet Craft Brewing** located in Charlottetown. Upstreet's flagship brew the Do Gooder is a reflection of their true community spirit, friendly outgoing staff, and Taproom atmosphere. You will have a chance to sample the Do Gooder in your flight of craft beer while savouring some tasty food bites!

#### Tour Includes:

- All transportation via private Coach Bus
- Fully Guided Experience
- Chilled bottled water
- Gift from HOP|SIP|SWIRL TASTING TOURS
- Flight, Tastings & Food Pairing fees at 3 locations
  - **Island Honey Winery Co.**
  - **Deep Roots Distillery**
  - **Upstreet Craft Brewing**

# No Plan is an Island

## Registration

To register online using a credit card or cheque, please go to:

<http://www.cpbi-icra.ca/Events/Details/Atlantic/2019/10-02-2019-CPBI-Atlantic-Regional-Conference>

### Registration Fees

**NEW! Membership Rewards:** We are pleased to announce the following exclusive benefits for CPBI Members:

- **Earlier Access to Conference Registration:** Members will have an exclusive opportunity to register for the conference between May 3 - May 20th, 2019.
- **Preferred Access to Hotel Rooms:** Members will have early access to the CPBI block of reserved rooms. Once registered, members will receive a link to book their hotel at Delta Prince Edward, with best available room options.
- **Early Bird Registration Prizes:** Members who register by June 30th will have a chance to win a gift certificate for a night at the Delta Prince Edward or one of two \$100 gift cards!

**Member Early Bird Conference Fee\*** - Open May 3 - June 30th, 2019

Member \$850.00

**Non-Member Early Bird Conference Fee\*** - Open May 21 - June 30th, 2019

Non-Member \$1,300.00

**Regular Conference Fee\*** - July 1 - September 20th, 2019

Member \$950.00

Non-Member \$1,400.00

**Spouse Fee** - \$275.00 (includes 2 breakfasts, 2 receptions, 2 evening meals and entertainment)

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

**Hop, Sip & Swirl Tour** - \$100.00 (spouses/guests are welcome to participate)

All prices are subject to applicable taxes.

\*Includes conference program and meals

### Cancellation Policy

Conference and activity cancellations received in writing prior to September 2, 2019 will be refunded in full. If received in writing between September 2, 2019 and September 16, 2019, any conference cancellations will be subject to a \$250.00 penalty and activity cancellations will be subject to a 50% penalty. There will be no refunds for any conference or activity fee received after September 16, 2019 for any reason, including weather or travel delays. Substitutions may be made at no cost. CPBI assumes no liability for changes in program, social activities, event dates or venue.

# No Plan is an Island

## Accommodations

Located on the historic Charlottetown Seaport in the heart of Olde Charlottetown, the Delta Prince Edward offers the unique charm of a waterfront resort, while just a mere five minute walk to the heart of the historic downtown – the ideal location for both business and pleasure!

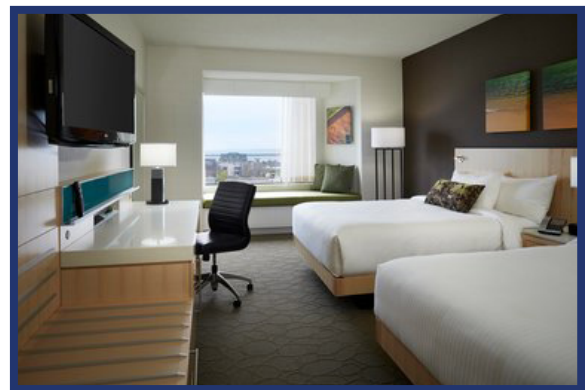
Once registered for the conference, you will receive the information code needed to book your Accommodations at Delta Prince Edward.

**Room Block Dates:** Check-in is 3:00 p.m. on Wednesday, October 2nd and check out is 12 noon on Friday, October 4th. There are a limited number of rooms being held pre and post-conference for those wishing to arrive early or stay late. Reservations must be guaranteed by credit card. **Cancellation policy is 48 hours prior to arrival.**

All rates based on single or double occupancy plus taxes per night. Children 18 years old and under sharing their parents' accommodation are complimentary.

Rates are subject to 15% HST and 3% Accommodation Levy (HST Applicable).

Cut-Off Date for Reservations is September 14, 2019. (Note: the block of rooms will no longer be held after this date and reservations will then be on a first come, first served basis. Rates will also be the rate of the day and availability is not guaranteed after this date).



## Pricing

Room Type	Single/Double Occupancy Rate (Per Night)
Standard	\$239.00
Water View	\$259.00

# No Plan is an Island

## Questions?

### Getting There

#### Directions to the Delta Prince Edward from the Confederation Bridge

- Continue to follow Trans-Canada Highway once off the bridge
- Follow the #1 all the way to Charlottetown (60km)
- Veer right onto University Ave., follow until Euston St. and take a right (signs for PE-236W)
- Take your next left onto Queen St. and follow to the Delta Prince Edward
- GPS Coordinates: 46.2317051, - 63.1244252

#### Directions to the Delta Prince Edward from the Charlottetown Airport

- Head north toward Sherwood Rd
- Exit the roundabout onto Brackley Point Rd
- Turn left onto Trans Canada Hwy
- At the roundabout, take the 2nd exit onto Trans Canada Hwy
- At the next roundabout, take the 2nd exit and stay on Trans Canada Hwy
- Continue Straight onto Water St
- Turn left onto Queen St, Delta Prince Edward is on the left

### Parking at the Delta Prince Edward

- On-site parking fee: \$3.00 CAD hourly, \$18.50 CAD daily
- Valet parking fee: \$25.50 CAD daily

### Bringing Your Spouse

Your partner/spouse is welcome to join you at the Conference. The partner/spousal fee is \$275.00 and includes all breakfasts, receptions, evening meals and entertainment. Please note conference lunches and breaks are not included. Delta Prince Edward has a onsite restaurant (Water's Edge) that is open daily until 10pm. There are also many great restaurants and cafes only a few minutes walk from the hotel. Check with the hotel for available daytime activities and outings.

### Attire

Business casual dress is appropriate for all Conference events.

### Cancellation Policy

Conference and activity cancellations received in writing prior to September 2, 2019 will be refunded in full. If received in writing between September 2, 2019 and September 16, 2019, any conference cancellations will be subject to a \$250.00 penalty and activity cancellations will be subject to a 50% penalty. There will be no refunds for any conference or activity fee received after September 16, 2019 for any reason, including weather or travel delays. Substitutions may be made at no cost. CPBI assumes no liability for changes in program, social activities, event dates or venue.

**If you have any questions about the conference, please contact us at:**

Tel: (902) 835-0391 or [atlantic@cpbi-icra.ca](mailto:atlantic@cpbi-icra.ca)