



BRIDGE TO SUCCESS

2015 CPBI ATLANTIC REGIONAL CONFERENCE

SEPTEMBER 16 -18 • 2015

DELTA PRINCE EDWARD
CHARLOTTETOWN, PE



CANADIAN PENSION & BENEFITS INSTITUTE



BRIDGE TO SUCCESS

CPBI Atlantic Conference Planning Committee

Co-Chairs

Tina Smith

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Virginia Wickstrom

University of Prince Edward Island

Committee

David Harding

Industrial Alliance

Kevin Hollis

Belmont Health & Wealth

Ryan Johnston

Manulife Financial

David Tutty

Sobeys Inc.

Schedule At A Glance

Wednesday, September 16th

11:00 a.m. - 6:00 p.m.	Registration
11:00 a.m. - 5:00 p.m.	Golf – Glasgow Hills Golf Course
12:00 p.m. - 4:30 p.m.	Culinary Boot Camp
1:00 p.m. - 5:00 p.m.	Out and About Charlottetown Tour
6:00 p.m. - 7:00 p.m.	Reception
7:00 p.m.	Lobster Dinner & Entertainment Featuring <i>The Stanfields</i>

Thursday, September 17th

7:00 a.m. - 6:00 p.m.	Registration Desk Open
7:00 a.m. - 8:15 a.m.	Breakfast
8:15 a.m. - 8:30 a.m.	Conference Opening
8:30 a.m. - 9:30 a.m.	Forum A
9:30 a.m. - 9:45 a.m.	Break
9:45 a.m. - 10:45 a.m.	Sessions 1 & 2
10:45 a.m. - 11:00 a.m.	Break
11:00 a.m. - 12:00 p.m.	Sessions 3 & 4
12:00 p.m. - 1:15 p.m.	Lunch
1:15 p.m. - 2:15 p.m.	Forum B
2:15 p.m. - 2:30 p.m.	Break
2:30 p.m. - 3:30 p.m.	Sessions 5 & 6
3:30 p.m. - 3:45 p.m.	Break
3:45 p.m. - 4:45 p.m.	Sessions 7 & 8
6:30 p.m. - 7:30 p.m.	Reception
7:30 p.m.	Dinner & Entertainment Featuring <i>Comedian Peter Anthony</i>

Friday, September 18th

7:00 a.m. - 8:30 a.m.	Breakfast
8:30 a.m. - 8:45 a.m.	AGM
8:45 a.m. - 9:00 a.m.	Closing Remarks
9:00 a.m. - 10:00 a.m.	Forum C
10:00 a.m. - 10:15 a.m.	Break
10:15 a.m. - 11:45 a.m.	Panel Session
12 noon	Lunch and Departure

Forum A - Thursday morning

Social Economy - Cross Country Check Up Spotlighting Atlantic Canada

Rex Murphy, Social Commentator and Editorialist

National treasurers need no introduction, and so it is with Rex Murphy, writer, broadcaster and professional thinker. He knows what makes Canadians tick, and what drives our political and social affairs. He makes us important and reminds us we have culture beyond hockey.

His thought-provoking, sometimes stinging commentary and original insights, delivered through a vocabulary to make Webster's consider updating, draws over 1 million listeners and at times 15,000 callers who want to join in discussions on Cross Country Checkup. Canadians are treated to weekly commentary from Rex on CBC's *The National* along with his Saturday column in the *National Post*. He's also acted as an editorial contributor to CBC Radio's *Definitely Not the Opera*.

He calls himself a Newfoundlander biting at the heels of Canadian conservatism.

Murphy, a Rhodes Scholar, was born and raised in St. John's, where he graduated from Memorial University and later went to Oxford University, along with former U.S. President Bill Clinton. Rex ran twice in provincial elections and lost both times. Maybe he was too honest?



Forum B - Thursday afternoon

An Unorthodox Journey to the Published Land

Terry Fallis, Award Winning Author and Consultant

Terry Fallis is the award-winning author of four national bestsellers. His debut novel, *The Best Laid Plans*, won the 2008 Stephen Leacock Medal for Humour and was crowned the 2011 winner of CBC Canada Reads as the "essential Canadian novel of the decade". *The High Road*, published in September 2010, and *Up and Down*, released in September 2012, were both finalists for Stephen Leacock Medals, with *Up and Down* debuting on the *Globe and Mail* bestsellers list and winning the 2013 Ontario Library Association Evergreen Award. Terry's fourth novel, *No Relation*, hit bookstores in May 2014, opened on the *Globe and Mail* bestsellers list, and recently won the 2015 Leacock Medal. Terry's fifth novel, *Poles Apart*, will be released in October 2015.

For more than 25 years, Terry has been speech writer to CEOs and cabinet ministers and has counseled corporate and government clients on various fronts including crisis communications, media relations, issues management, marketing communications, public opinion polling, public affairs, and stakeholder relations. In his presentation, Terry will enlighten delegates in these important areas of communication and will also trace the strange journey he took with his first novel, *The Best Laid Plans* that started as a self-published novel sold out of the trunk of his car and ended up as a six part TV series and a stage musical.



Photo: Tim Fallis

Forum C – Friday morning

Dragging Canada's Health Care System Into the 21st Century

Jeffrey Simpson, National Affairs Columnist, *The Globe and Mail*



Jeffrey Simpson has his finger on the pulse of Canada – and the world. The *Globe and Mail's* national affairs columnist since 1984, Simpson is one of the few outstanding political writers who can express his opinions equally as well spoken, as in writing. Mr. Simpson is the author of seven books, including *Chronic Condition: Why Canada's Health Care System Needs to be Dragged into the 21st Century*, and meets health care head on. He will explore what he believes to be the only four options we have to end the growing crisis in Canada's health care system: cuts in spending, tax increases, privatization, and reaping savings through increased efficiency.

He will examine the tenets of the Medicare system that Canadians cling to so passionately. Mr. Simpson will also discuss how many other countries have more extensive public health systems, and Canadian health care produces only average value for money. In fact, our rigid system for some health care needs and a costly system for other needs – drugs, dentistry, and home care – is really the worst of both worlds

Session 1

National Standard of Canada for Psychological Health and Safety in the Workplace (the Standard): The Employer Journey

Carolyn Campbell, Province of Nova Scotia

Nitika Rewari, Mental Health Commission of Canada (MHCC)

Following the release of the Standard, employers were left to interpret what it meant and decide how they would implement it successfully. For many employers this has been a struggle, due to lack of understanding of the intent of the Standard and the process of implementation, which at times leaves employers asking questions. In this session, Ms. Rewari will discuss workplace mental health, what the Standard is and why we should heed it. She will explore the tools and resources offered by MHCC and share insight from a case study project and learnings thus far. Ms. Campbell will share her experiences from the journey to date with the new Standard, the challenges, barriers and opportunities to implementation and the Province's "lessons learned" along the way.

Session 2

2015 Legal Update

Kiersten Amos, McInnis Cooper

Kiersten Amos will take participants through what has been another interesting year of legal developments in the pension and benefits arenas across Canada. Whether a provider or a plan sponsor, Kiersten will review the top legal cases and issues with which participants should be familiar as they undertake their governance and administrative responsibilities.

Session 3

Specialty Drugs: The Future Is Now

Tara Anstey and Alan Kyte, Mercer

As the Canadian specialty drug reimbursement landscape continues to evolve, it is valuable for Canadian employers, benefit consultants and advisors to be aware of specialty drug coverage issues and approaches in order to ensure long term sustainability of employer drug benefit plans. In this session, the presenters will highlight current issues around specialty drugs in the marketplace, discuss drug plan management challenges and considerations, with a focus on managing plan risk related to high priced drugs. Participants will also be provided with a glimpse into what the future may hold for specialty drug therapy. What new products may appear on the market in the next 5 years and what their impact will be on private plans?

Session 4

Target Date Funds: Are they the Solution or a Potential Liability?

Jonathan Croft and Lori Park, Mercer

Target Date/Target Risk funds have grown in popularity for Defined Contribution plans. Many plan members see target date funds as the solution so they do not have to be involved in the investment process. Does it give them the false impression that it will provide all their needs in retirement? This session will explore how target date/target risk funds have developed, how different approaches are being applied to their construction and what can be done to educate members on the expectations to ensure they are well-informed.

Session 5

Evolution of Provincial Healthcare: Opportunities and Challenges for the Delivery of Healthcare in Atlantic Canada

Vijay R. Bhashyakarla, Province of Nova Scotia

Roy Cairns, Province of Prince Edward Island

The changing tides of provincial healthcare have an impact on private benefit plans. Vijay Bhashyakarla and Roy Cairns will discuss the opportunities and challenges for Atlantic and Inter-provincial policy development for the delivery of public healthcare in Atlantic Canada and how this may impact private benefit plans. The Atlantic provinces are facing fiscal challenges and Premiers are committed to working together. Mr. Bhashyakarla will examine Atlantic healthcare collaboration, its scope and expectations while Mr. Cairns explores healthcare collaboration from a drug perspective at both the pan-Canadian and Atlantic levels.

Session 6

Changing the Landscape: Bending the Impact Curve on Diabetes and Related Health Conditions

Jake Reid, Canadian Diabetes Association

Currently one in four Canadians live with diabetes or prediabetes. The increasing rate of diabetes and its complications pose a serious burden on communities, workplaces, the healthcare system, and our economy. Mr. Reid will address the personal and societal implications of the diabetes epidemic in Canada and what can be done to mitigate this impact.

Session 7

The Evolving Spectrum of Investment Structures

Brad Rowe, Eckler Ltd.

Many plan sponsors do not have the internal resources, skill set or time to focus on non-core organizational issues and are looking for solutions. This session will explore the evolving spectrum of investment structures ranging from what is viewed as the traditional approach to the full outsourcing of the investment program. The session will explore the types of structures as well as the differences and similarities along the spectrum. Attendees should also gain some insight into the motivating factors that plan sponsors confront when choosing the right fit.

Session 8

Beyond the Survey of Employee Engagement

John Yardley, Metrics @ Work

Susan Frizzle, Deltaware Systems

Jennifer Brooks, Manulife Financial

Employee engagement surveys continue to be important tools in the HR toolbox to gauge employee satisfaction, contentment, engagement and other important key indicators. However, a survey is only a tool and it is only as good as what the organization does with the information it provides. In this interactive session, Mr. Yardley will outline his thoughts on why employers need to move beyond the tool. Deltaware and Manulife will present as two organizations that have produced positive workplace change from implementing actionable steps through using survey metrics.

Panel - Friday Morning

Top Ten Things to Consider in Retirement and Estate Planning

James Nicholson, Scotia MacLeod

Horace Carver, HBC Law

TBD, Grant Thornton

Planning for retirement and end-of-life can be daunting. It's not something that many want to even think about; however, it's best to plan now before parents or spouses find themselves in difficult situations. This session, led by industry experts, will help participants think about the major considerations to plan for a successful retirement and end-of-life experience. This is a very timely discussion of those considerations including pension de-accumulation, efficient tax planning and living wills to name a few.

Entertainment

The Stanfields – Wednesday night

The Stanfields attract fans of all classes and creeds across North America and Europe with their rhythm-fueled hard rock laced with traditional roots sounds. There are no glamorous motives – just five working class Canadians with an honest desire to entertain. The band has three full-length recording projects to their credit, *Vanguard of the Young and Reckless* (2010), *Death & Taxes* (2012) and an acoustic project, *For King and Country* (2013). The Stanfields tour incessantly across Canada and Europe and have been honoured with a fistful of awards including 2013 Entertainer of the Year Awards from both Music Nova Scotia and the East Coast Music Association. In December 2014, The Stanfields represented the Province of Nova Scotia at the annual Boston Tree Lighting.



Peter Anthony – Thursday night

Peter Anthony is a Canadian Comedy Award Winner (“Breakout Artist” 2008) and nominee (“Best Male Standup” 2013). He is originally from Pictou, Nova Scotia. He has established himself as one of the most passionate comedians in the country, constantly pushing the envelope and developing his distinctive, hilarious point-of-view.

Some of Peter’s credits include: Montreal’s “Just for Laughs” Festival, CBC’s “Halifax Comedy Festival,” Toronto’s “North by Northeast” Festival, CBC Radio’s “The Debaters,” and television appearances on The Comedy Network, MTV, and CTV’s “Comedy Now.” Outside of the club and festival circuit, Peter also performs as a corporate entertainer.



Robert Pendergast – Oyster Shucker – Thursday night reception

Robert Pendergast is a native of the western tip of Prince Edward Island. He is well-known as a chef who gets excited about the local bounty! An Irish and Acadian descendent, Robert studies the connections between great country foods and his island heritage. After years of cooking in Canadian cities and throughout Europe, he returned to PEI in 2003. Be prepared to share a story of food and travel with Robert as he shucks ice cold native oysters to welcome you to the island in his own special way!



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 Island's exceptional golf experiences. The golf course runs over diverse terrain that challenges players of every skill level. 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 11:30 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.

Out and About Charlottetown Tour

Your tour of Charlottetown will take you to four locations around the city where you will sample a variety of food and beverages. At the Merchantman, you will enjoy some oysters, enjoy a sample of locally crafted PEI Brewing Company beer and take part in an interactive oyster shucking demonstration with Kiel Vessey. You will then head into Sims Corner with Chef Kyla Panton for a steak sandwich or chicken flatbread and two - 1 oz. glasses of scotch to profile two different styles. These may be enjoyed before or after the meal. When you reach the Gahan House, you will meet Brew Master Trent Hayes for a beer lesson and dessert pairing from Chef Cody Wallace. Your tour will then take you to the PEI Brewery Company for a full brewery tour with a "Beer 101" class where you will learn all about the art and history of the PEI Brewing Company and the locally handcrafted ales. Guests will be shuttled to the various venues and returned back to the Delta Prince Edward.

Culinary Boot Camp

Wear chef's whites and enjoy the experience of being in the kitchen while creating delicious recipes in teams. You will be working in a state-of-the-art kitchen learning tricks of the trade... and go home with your own Culinary Institute of Canada chef's apron and hat... stains included! You will also receive copies of the recipes prepared that day. You will enjoy all the food that was prepared, along with a complimentary glass of wine per "bootcamper". The boot camps are designed to provide a fun, unique and memorable learning experience. All participants are encouraged to bring their cameras to capture the memorable moments at the Culinary Institute. Register early as there are limited spots available.



You will be able to say... *"I CAME... I COOKED... I CREATED!!!"*

Registration

To register on-line using a credit card or cheque, please go to:

www.cpbi-icra.ca/Events/Details/Atlantic/2015/09-16-2015-Atlantic-Regional-Conference-1

Due to limited space, your room may be booked in advance of your conference registration. However, if your conference registration is not received within one week, your room will be released. You are encouraged to book your room and register for the conference at the same time.

Registration Fees

Early Bird Conference Fee* – book by **June 30, 2015**

Member \$600.00

Non-Member \$800.00

Conference Fee* – book after **June 30, 2015**

Member \$700.00

Non-Member \$900.00

Spouse Fee \$250.00 (*includes breakfasts, receptions, evening meals and entertainment*)

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


Out and About Charlottetown Tour \$70.00 (*spouses/guests are welcome to participate*)

Culinary Boot Camp \$99.00 (*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 August 16, 2015 will be refunded in full. If received in writing between August 16, 2015 and September 2, 2015, 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 2, 2015 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.



**Register by June 30th for a chance to win a Gift Certificate for
2 nights accommodations at the Delta Prince Edward**

Accommodations

The Delta Prince Edward



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!

Accommodations can be booked on-line directly through Delta Prince Edward at <https://www.deltahotels.com/Groups/Delta-Prince-Edward-Groups/Canadian-Pension-and-Benefits-Institute> or by calling Reservations line at 1-877-450-7752. Please quote **Block Code - CANA0916**

Room Block Dates:

Check-in is 3:00 p.m. on Tuesday, September 15th and check out is 12 noon on Friday, September 18th. 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 24 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 14% HST and 3% Accommodation Levy (HST Applicable).

Cut-Off Date for Reservations is:

August 15th, 2015 (*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*).



ROOM TYPE

SINGLE/ DOUBLE RATE

Mode	\$189 ⁰⁰ CDN
Mode Water View	\$209 ⁰⁰ CDN
Mode Deluxe	\$219 ⁰⁰ CDN
Mode Deluxe Water View	\$229 ⁰⁰ CDN

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

Parking at the Delta Prince Edward

Rates for on-site underground parking are \$17^{.00} for self-parking (plus HST) and \$18^{.75} for valet parking (plus HST) per day. Please note rates are subject to change.

Bringing Your Spouse

Your spouse is welcome to join you at the Conference. The spousal fee is \$250^{.00} and includes breakfasts, receptions, evening meals and entertainment. Check with the hotel for available daytime activities and outings.

Attire

Casual dress is appropriate for all Conference events.

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

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

www.cpbi-icra.ca