



CANADIAN PENSION AND BENEFITS INSTITUTE
ONTARIO REGION
APPLICATION FORM

If you are interested in serving on the Ontario Regional Council of the Canadian Pension & Benefits Institute for a **term of three years (2015 – 2018)**, or on a working committee of Council for one year, please complete this form and return it, **along with a short resume**, by February 27, 2015 to Jackie Ablett, CPBI Ontario Region, 200 Bay Street, PO Box 64003, Toronto, ON M5J 2T6. Fax: 1 905-643-2972 or e-mail: ontario@cpbi-icra.ca.

| | | |
|--|--------------------------|------------------------------------|
| I am interested in volunteering to serve on: (see page 2 for details) | <input type="checkbox"/> | Ontario Regional Council |
| | <input type="checkbox"/> | A working committee of Council |
| First Name | | Name of Employer/Firm/Organization |
| > | | > |
| Last Name | | Title |
| > | | > |
| E-mail | | Address 1 |
| > | | > |
| Phone | | Address 2 |
| > | | > |
| Fax | | City & Postal Code |
| > | | > |

My employer/firm/organization (Select one or more):

| | | | |
|---------------------------------------|-------------------------------------|---|--------------------------------|
| Plan Sponsor <input type="checkbox"/> | Consultant <input type="checkbox"/> | Service Provider <input type="checkbox"/> | Other <input type="checkbox"/> |
|---------------------------------------|-------------------------------------|---|--------------------------------|

| | |
|----------------------------|--|
| If Other, provide details. | |
|----------------------------|--|

My involvement in the Pension & Benefits industry is primarily in the area of:

| | | | |
|--|-----------------------------------|---|--------------------------------|
| Pensions <input type="checkbox"/> | Benefits <input type="checkbox"/> | Pension Investment <input type="checkbox"/> | Other <input type="checkbox"/> |
| Signature (is not necessary if returning by email) | | Date | |
| | | | |

Please note: All applicants will be contacted after March 19, 2015.

Please review the attached information about the roles and responsibilities of Council members and committee objectives.

CPBI Mission: To provide CPBI members with the opportunity to participate in high quality, cost-effective education and networking events that focus on the exchange of information and the analysis of the best practices related to pensions, employee benefits and investments, at the national and regional levels across Canada.

CPBI Vision: The CPBI will strive for a strong brand image and to be a well-run organization with unity of purpose and connectivity to its members while offering education and networking programs and services.

CPBI Values: In its governance and programs, CPBI adheres to the following values: – Innovation and quality service to members – Creativity in networking – Results oriented teamwork – Accountability and integrity.

CPBI Ontario Regional Council

CPBI Ontario Regional council is dedicated to organizing and facilitating of premier educational and networking events for pension and benefits professionals across the province. We are focused on offering education and timely information about pensions, benefits and related investments. New members of Council are elected each spring. All members are expected to attend each Council meeting. The schedule is determined at the first meeting of the council year to help avoid scheduling conflicts. In addition, each Council member will sit on one of the working committees.

Working Committees

1. Program Committee

This team designs, promotes and executes three signature breakfast seminars:

- Investment Trends
- Benefits Outlook
- Pension Summit

The Program Committee's goal is to deliver interesting and topical presentations to the community, while at the same time ensuring they are financially viable. Typically, the Committee meets in May or early June to develop the content for each of the Signature seminars, determine dates and content of any other ad hoc seminars proposed.

2. 2016 Regional Conference Committee

The Ontario Regional Council adopted a plan to hold a Regional Conference every two years. There was a conference in 1998 in Kitchener, 2000 in Ottawa, 2002 in London, 2004 it was held in Toronto and the 2006 conference was held at Deerhurst Resort. In 2007, the Council voted to move the conference to an annual event. The 2015 conference will be held at the Hilton Toronto, October 28-29, 2015. The 2016 Conference Committee will begin working on that event immediately following this year's conference.

3. Membership Engagement and Communications

This committee will be reviewing and recommending: - clearly state the value of CPBI membership - increase membership – particularly plan sponsors - develop events specifically for plan sponsors - publish 3 – 4 topical newsletters per year, as well as using social media to enhance the profile of CPBI

4. Professional Development

CPBI Ontario has partnered with HRPAs and has created two Certificate programs: • Benefits Certificate Program – Level 1, 2 and 3 • Pensions Certificate Program – Level 1, 2 and 3 The delivery of these programs is organized through HRPAs, with CPBI members offered the price of HRPAs members. Information about these two programs is on the CPBI website and HRPAs website.

Promote industry related non-CPBI educational events, with reciprocal CPBI promotion.