

DAWN OF A NEW AGE: *WHERE THE SUN RISES FIRST*

20th
CPBI ATLANTIC
CONFERENCE

2024 CPBI ATLANTIC CONFERENCE REGISTRATION PACKAGE

Breakout Sessions: Thursday Morning

Thursday, October 3, 2024

10:00am - 11:00am

Session 1 (Benefits)

Balancing Act: Navigating the Affordability Challenge in a Changing Benefits Landscape

Speakers: Marie-Helene Dugal, Medavie Blue Cross
Rowen Lamont, Mercer

Cost of living concerns continue to dominate the national conversation with significant spillover effects for employers. In today's competitive labour market, employee and employer affordability concerns are driving a rethinking of plan design and management strategies. Rapidly changing public plans and private market offerings present new challenges and opportunities for plan sponsors, and as the largest driver of costs and public policy evolution, drug plan coverage is at the epicenter of this discussion. This session will provide an advisor and carrier perspective on this balancing act – reviewing benefit plan cost dynamics, revisiting the business case for offering a benefit plan, and offering new strategies for managing costs while delivering value to employees.

Session 2 (Pension/Investments)

The Digital Analyst: How To Appropriately Use A.I. In Security Selection

Speaker: Srikanth Iyer, Guardian Capital

While the expanding use of generative artificial intelligence (AI) has captured the public's imagination of late, using AI in portfolio management is not an entirely new phenomenon. The i3 Investments™ portfolio management team at Guardian Capital LP has used AI and machine learning as a tool in equity selection for the better part of the last decade. With this experience comes a lot of learning about where A.I. can be beneficial, but also where it can fall short in the investment process. Srikanth Iyer, Managing Director, Head of i3 Investments™, will illustrate how his team has integrated AI into their portfolio management system, its potential to detect areas for enhancing returns, particularly in identifying key earnings and dividend trends, while outlining the continued need for human oversight and discretion in its usage.

Breakout Sessions: Thursday Morning

Thursday, October 3, 2024

11:15am - 12:15pm

Session 3 (Benefits)

Pulling Teeth: Can We Control Costs in a Complex Dental Landscape?

Speaker: Dr. Carlos Quiñonez, Vice Dean and Director, Schulich Dentistry Western University

While drugs have been the fastest growing expenditure in benefits plans, post-COVID-19 all eyes are on dental care with rising utilization trends, rapidly increasing prices, and now, the introduction of a federal dental care plan – the landscape has never been more complex and controversial. It's time to sink our teeth into strategies to bring long term sustainability back to dental benefits. By joining this engaging and dynamic discussion you will gain insight into:

- The after-effects of COVID-19 on the dental care market, including impacts on patients, practitioners, service delivery, regulation, policy, claims, and pricing.
- The research on oral health and its effects on systemic illnesses and the importance of oral health to overall health.
- Offering coverage that is evidence based as opposed to dental lore based: an opportunity for a second look at your plan vs. your budget.
- The elephant in the room: the federal dental care plan and what it may mean for private plans.
- The future of dentistry – how “corporate” can it get?
- The role stakeholders play.

Session 4 (Pension/Investments)

Unhappily Ever After: Pensions and Marriage Breakdown

Speaker: Dante Manna, Stewart McKelvey

Pensions are often among the most valuable of family assets in a spousal separation or divorce. Join pension law practitioner Dante Manna for a discussion of frequently asked questions, as he navigates the nuanced and complex legal issues pertaining to pension division.

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Breakout Panel Sessions: Thursday Afternoon

Thursday, October 3, 2024

1:30pm - 2:45pm

Session 5 (Benefits)

Breaking Barriers: A Roadmap to Client-Centered Disability Management

Panel: Rosalie Croteau, HUB International
Kelly Nichols, NL Hydro
Eric Minardi, Desjardins

In an ever-evolving landscape encompassing mental health complexities and the integration of inclusive practices, proactive strategies and a collaborative approach are essential. This session will tackle the pressing challenges of disability management and focus on each participant's role in claims and return-to-work processes, with a focus on addressing absences beyond procedural requirements. By embracing a client-centered approach, we not only enhance the quality of life for employees but also mitigate risks and foster a supportive workplace culture. Discover holistic disability management approaches and effective collaboration among employees, employers, healthcare services, community supports, and insurers, guided by case managers and rehabilitation consultants.

Session 6 (Pension/Investments)

Plan Consolidation with DB Pension Plans

Panel: Paul Lai Fatt, CAAT Pension Plan
Jonathan Croft, Mercer
Blair Richards, Halifax Port ILA/HEA

DB or DC? Is bigger better? Recent trends, particularly in Atlantic Canada, have reignited these long-standing questions as several DB pension funds have moved forward with various initiatives to entice smaller DB, DC and Group RRSP plans towards plan consolidation. Join our panel discussion as we explore these and other important issues that employers, labour and plan sponsors should consider when reviewing their pension strategies.