



HEALTHY, WEALTHY AND WISE

2015 CPBI ONTARIO REGIONAL CONFERENCE



2015 CPBI Ontario Regional Conference Speaker Profiles



Jackie Arnold

Jackie Arnold, Owner of *Net 10 People Solutions* has been coaching and supporting leaders for over 15 years. In Partnership with EWS Networks Jackie spearheaded a Wellness Initiative with her client Bruce Telecom which led to increased employee engagement and an aggregate cost savings of over \$130,000. Jackie holds a Bachelor of Arts Degree in Sociology from the University of Guelph and has taken various Human Resources Management programs in addition to the Teaching and Training Adults program.



Sarah Beech

Sarah Beech is the President of Accompass (formerly Pal Benefits), working out of the Toronto office. She is responsible for the overall management and operation of the firm. Sarah has more than 2 years' experience in the benefits industry. She began her career as an underwriter with a major Canadian insurance company, becoming the department supervisor within two years. She joined Hewitt Associates, a global human resources and outsourcing firm in 1990, where she eventually led the benefits consulting practice and, later, the entire Canadian consulting operation. She joined Accompass in 2012.

In her current role, Sarah creates and implements the firm's business and marketing strategies, and builds, develops and manages new and existing client and third-party relationships. Sarah is a member of the advisory board of *Benefits Canada* magazine and is frequent spokesperson and author on the topic of employee benefits. Sarah is a member of the Corporate Industry Council for Homeward Bound. She has a Bachelor of Arts degree from McGill University.



Dan Berty

Dan Berty is Executive Director of the Canadian Drug Insurance Pooling Corporation (CDIPC). Mr. Berty has over 30 of senior management experience in the Canadian health and dental benefits market and been CDIPC's Executive Director since January 2015. During his time in the industry he has provided executive leadership on a wide range of operational and strategic initiatives. He has also provided expert advice on the Canadian group benefits business to software companies, claims companies, insurers, and medical provider associations.



Tom Blake

Tom Blake is one of North America's most energetic motivational speakers, business consultants and sales management professionals. Blake is the Chairman of Sprout Wellness Solutions, which offers businesses a platform that keeps employees engaged and gives management the tools to measure results. He was previously co-founder of Optimé International, a leading consulting firm he established to engage organizations in sales execution, effectiveness, training and development. Prior to Optimé, Blake worked at the executive level with Procter & Gamble as their national sales manager.

	<p>Blake's leadership has transformed the sales and marketing techniques of such companies as Cadbury-Adams, RBC, Nestlé and Pepsi. He has a reputation for delivering outstanding results in highly complex and competitive markets.</p> <p>Committed to your organization's success, Blake tailors his presentations to meet your specific needs, challenges and opportunities, helping you achieve outstanding results.</p>
	<p>Isabelle Bouchard</p> <p>Isabelle Bouchard is Vice President, Group Reinsurance for RGA Canada. Her responsibilities include the development of new and existing client relationships as well as operational aspects of RGA's group reinsurance business in Canada, including actuarial pricing, underwriting, claim management and financial reporting.</p> <p>Isabelle is an actuary with a successful track record in group insurance in Canada. She is involved in several industry committees and is the past chair of the Canadian Institute of Actuaries (CIA) group committee. In addition, she is a Fellow of the Canadian Institute of Actuaries (FCIA) and the Society of Actuaries (FSA). She is also a regular speaker at actuarial meetings.</p> <p>As a former benefits consultant, Isabelle understands the group marketplace from the employer side and knows how employers think. Her additional experience with a group reinsurer provides her with an intimate knowledge of the group insurance/reinsurance marketplace.</p>
	<p>Nigel Branker</p> <p>Nigel is a Partner at Morneau Shepell and leads the Ontario Pension Consulting Practice. An actuary with 20 years of experience providing strategic advice on pension plans and other retirement benefit arrangements, Nigel serves as client relationship lead and trusted advisor to a large number of Morneau Shepell's clients.</p> <p>With a strong understanding of multiple lines of business, the industry, and our clients' businesses, he delivers responsive and forward-thinking solutions that best meet organizations' needs and objectives, while leveraging Morneau Shepell's complete service offering.</p> <p>Nigel is an experienced thought leader in both defined benefit and defined contribution pension plan design. He has a wide range of experience with plan implementation and financial management, member education and communication, as well as integrated administration solutions.</p> <p>Nigel is a Fellow of the Canadian Institute of Actuaries and a Fellow of the Society of Actuaries. He has an Honours Bachelor's degree in Actuarial Science and Mathematics from the University of Western Ontario. He is a regular author and industry speaker.</p>
	<p>Daniel Brosseau</p> <p>Daniel Brosseau, President, Letko Brosseau & Associates, a private Montreal and Toronto based investment management firm currently managing \$30 billion in mostly balanced mandates for pension funds, foundations, corporations and individuals. Prior to founding Letko Brosseau in 1987 with Peter Letko, both he and Mr. Letko worked at the CN Pension Fund.</p>
	<p>Kate Davis</p> <p>A speaker, comedian, writer, mother and actress, Kate Davis has the unique ability to find humour in any situation and offer creative solutions to defuse the frustrations in the home and workplace. Kate's generous insight and outspoken character, provides a powerful combination to help organizations empower their staff with effective tools for managing stress and sustaining motivation.</p> <p>Read more</p>



Tracey Drach

Tracey Drach is Manager, Human Resources – Compensation and Benefits and is responsible for overseeing global compensation, benefit, and recognition strategies for Enerflex Ltd. Her role also encompasses pension governance, HRMS, and global mobility. She has been with Enerflex for 4 years and is a senior member of the Corporate Services team reporting to the Senior VP, Corporate Services and Chief Information Officer. She earned a Bachelor of Science degree from the University of Lethbridge. Ms. Drach holds both Certified Human Resources Professional and Certified Compensation Professional designations.



Tracey DuCroix

Teresa manages Workplace Health, Safety and Wellness Division at York Region. York is an early adopter of the CSA Psychological Health and Safety standard and her team is currently leading its implementation. She believes in an integrative and collaborative approach to healthy workplaces.



Peter Frampton

Peter Frampton joined The Learning Enrichment Foundation (LEF) in 1993 and has had a long history with LEF integrating enterprises, programs and initiatives that support the needs of the community and leverage the expertise of the organization. As the Executive Director Peter is the CEO of LEF whose mandate is community economic development, employs 325 people, and has an annual budget of approximately \$16 million.

LEF’s mission is to provide community responsive programs and services, which enable individuals and families to become valued contributors to their community’s social and economic development. LEF, located in the most disadvantaged part of Toronto, serves thousands of people each year in programs ranging from community enterprises to childcare centres. LEF’s integrated model of service includes settlement services, employment counseling, career exploration, skills training, employer outreach, self-employment training, English for immigrants and youth mentorship programs.

Peter has been a member of the Board of Directors of The Canadian Community Economic Development Foundation (Chair of Membership Committee), and is currently on the Board of Telecommunities Canada. He has sat on various task forces including the Federal Social Economy Advisory Task Force, and The Mayor’s Child Care Task Force. Peter is a recipient of the Queens Golden Jubilee Award and currently sits on the Municipal Committee of the Toronto Board of Trade.



Sal Guatieri

Sal Guatieri is a Senior Economist and Director at BMO Capital Markets, with two decades experience as a macro economist. With BMO Financial Group since 1994, his main responsibilities include analyzing and forecasting the U.S. and Canadian economies, housing markets, interest rates and exchange rates. He is a regular commentator on economic and financial market trends to the media. Prior to joining BMO, Sal worked at the Bank of Canada, contributing to the staff’s quarterly economic projection and analyzing foreign exchange markets. Sal received his Masters degree in Economics from Queen’s University in 1990. He was Secretary for the Toronto Association for Business and Economics from 2000 to 2010.



Janice Holman

Janice is a Principal at Eckler and leads the DC consulting group. She helps clients with establishing governance structures, plan design, recordkeeper selection and monitoring, creation and monitoring of investment programs, evaluating plan effectiveness and operation, and member communications. She has a unique combination of experience that allows her to provide her clients with a comprehensive approach to DC consulting.

**Clara Hughes****Six-Time Olympic Medalist in the Summer and Winter Olympic Games**

“Being a champion is not just about winning,” says six-time Olympic medalist Clara Hughes. Believing that actions off the track define us as much as those on it, Hughes inspires people toward success in all areas of their lives.

Clara is the only Canadian to have won medals in both the Summer and the Winter Olympics: in the 1996 Summer Olympic Games, she received two bronze medals in cycling; and over the course of three Winter Olympic Games, she received four medals—one gold, one silver, and two bronze—in speed skating.

[Read more](#)

**Sarah Hume**

Sarah Hume, Director, Client Services joined the Allianz Global Assistance Canada team in 1999. Sarah has held a variety of positions throughout her career with Allianz Global Assistance, including numerous roles within the Operations team, Manager of Strategic Partnerships, Director of Client Services – Retail Business and Cost Containment, and is currently in the position of Director, Client Services – Group Business. As Director of Allianz Global Assistance Canada’s Group division, Sarah’s focus is on clients within the group insurance and online channels. Sarah holds an Honours degree from Wilfrid Laurier University, and is a member of the Travel Health Insurance Association.

**Robin Ingle**

Robin is chairman and CEO of Novus Health—part of the Ingle Group of Companies, which provides health management, travel insurance, and security solutions to major insurers across Canada and to travelers worldwide. He’s passionate about helping organizations reduce risk and connecting individuals across the world to the health care services they need. At Novus Health, Robin has focused his passion to create Canada’s leading service aimed at helping individuals navigate the Canadian health care system and better manage their health.

With over three decades of experience, Robin has always taken a hands-on approach with product design, marketing, underwriting, administration, claims/emergency assistance, licensing, and re-insurance, and he and his teams have evolved into industry leaders.

Robin regularly participates in media interviews, seminars, and lectures worldwide. His expertise has been a valuable resource for governments, consumers, and the insurance industry.

**Zaheed Jiwani**

Zaheed Jiwani is Senior Vice-President, Client Strategy for *Greystone Managed Investments Inc.*

As head of Client Strategy, Zaheed leads Greystone’s defined contribution business. In addition, he is responsible for thought leadership and product development for Greystone.

Before joining Greystone, Zaheed was Principal and Head of the Canadian Defined Contribution team for Aon Hewitt. His previous experience includes positions with Manulife as an internal investment consultant and with Mercer in its investment consulting practice.

Zaheed holds a Bachelor of Science degree in Actuarial Science from the University of Toronto as well as his CFA Charter.

**Jillian Kennedy**

Jillian Kennedy is a Principal in Mercer's Investment Business. She is responsible for leading the development and execution of Mercer's growth strategy for its Canadian Defined Contribution Business. She is also a member of the Defined Contribution Consulting specialist team.

Jillian's main practice area is the design, implementation and ongoing monitoring of defined contribution (DC) plans. She has extensive experience in designing and benchmarking DC plans, conducting investment manager and recordkeeper searches, and developing appropriate governance and investment structures for these plans. Jillian also assists clients with investment manager and recordkeeper performance reviews. Jillian has been with Mercer for over eight years. Prior to joining Mercer, she spent seven years with a major insurance company where she was involved in product development, plan transition projects, plan member education and marketing.

**Renu Khosla**

Renu Khosla is the Joint Employee Assistance Program and Wellness Education Co-Ordinator for the Greater Essex County District School Board. Renu Khosla has been providing E.A.P. services for over 25 years and is recognized for her leadership in promoting healthy and accountable workplace cultures. Renu is a certified mediator, wellness education specialist and mental health coach for organizations. She is passionate about inspiring individuals to embrace and enhance their well-being.

**Giselle Kovary**

As a managing partner and co-founder of n-gen People Performance Inc., Giselle helps clients build strategies and programs that target, motivate and engage a multigenerational workforce. She is a sought after resource to industry leaders across North America, in both the private and public sectors. With over 17 years of experience in learning and development, she has devoted the last 12 years to researching the impact that generational differences have on organizational performance.

[Read more](#)

**Peter Loewen**

Peter Loewen is an Assistant Professor in the Department of Political Science and the Munk School of Global Affairs at the University of Toronto. His research is mostly related to the political behaviour of citizens and politicians, and has been published in leading journals of political science, economics, and general science. In addition to his academic work, he writes a regular column for the Ottawa Citizen and advises clients on measuring and shaping public opinion and political behaviour.

[Read more](#)

**Susan Nickerson**

Susan Nickerson is a partner in the firm's Pension, Benefits and Employment group. Recognized as a leading pension and benefits lawyer, Susan's practice focuses on all areas of pension and benefits law and governance. She advises clients on issues ranging from risk management and defined benefit to defined contribution pension plan conversions, to implementation of new plan designs and benefit reduction initiatives. She also provides advice on the pension and benefit plan implications of corporate restructurings and insolvencies. With particular expertise in pension plan governance, Susan develops and implements pension plan governance structures and systems.

An active member of the pension community, Susan is a frequent speaker and moderator on emerging industry issues and has a particular interest in policy development on a provincial and national level. She is the Chair of the National Policy Committee of the Association of Canadian Pension Management (ACPM) and a member of the ACPM Executive Committee.

**Ryan Pollice**

Ryan Pollice is a Senior Associate within Mercer's Investments business. Located in Toronto, Ryan is the Canadian Business Leader of Mercer's Responsible Investment team. Ryan is responsible for advising institutional investors on a wide range of investment consulting issues including investment strategy, manager selection, and performance monitoring as well as supporting client interests in investment strategies which incorporate environmental, social and corporate governance ('ESG') factors.

Prior to joining Mercer in early 2011, Ryan spent 3 years working for the United Nations-backed Principles for Responsible Investment (PRI) on the development of the PRI's Reporting & Assessment framework and supporting the Executive Director and Board on various strategic initiatives. Ryan graduated from the University of Waterloo with a Master's degree in Environment and Resource Studies.

**John Prezioso**

John Prezioso is a partner in Hicks Morley's Toronto office, practicing exclusively in the area of pensions, employee benefits and executive compensation. John advises a range of private and public sector clients on matters relating to pension plan governance, compliance and administration, including issues relating to benefit entitlement, communications, pension investment, conversions and wind-ups. He also advises employers with respect to the administration and modification of group benefit plans for employees and retirees, including employee disability benefit plans.

	<p>John regularly provides employment and tax advice in relation to the drafting, administration and interpretation of equity-based and other incentives, including stock option, phantom share unit, deferred share unit and stock appreciation rights plans.</p> <p>John received his B. Sc. from the University of Toronto in 1998, and his J.D. from Osgoode Hall Law School in 2001. Prior to joining Hicks Morley, John practiced pensions and benefits law at a full-service national law firm, before serving as senior policy advisor to two provincial cabinet ministers.</p>
	<p>Renee Ruccolo</p> <p>Renee Ruccolo is the Staff Development Coordinator with the City of Windsor. Since 1996, she has worked in the Human Resources Department coordinating an array of award winning workplace learning and development programs. In 2007, The City of Windsor’s Learning & Development Opportunities Programs were nationally recognized as exemplary and of exceptional quality, having received the 2007 Canadian Association of Municipal Administrators (CAMA) Award of Excellence for Municipal Workplace Literacy and Learning Achievements in the category of “<i>Organizational Commitment to Workplace Literacy and Learning.</i>” In June of 2009, the City was once again presented with CAMA’s Award of Excellence for Municipal Workplace Literacy & Learning Achievements in the category of “<i>Recognition of Workplace e-Learning Initiatives</i>”.</p> <p>Through a compilation of organizational workplace initiatives, she has been fortunate to work alongside a number of talented individuals and external partners that lauded the City of Windsor the <i>2010 E.A. Danby Award</i> in recognition of the City’s Employee Mentoring Program and twice recipient of the Platinum Award for “<i>Working Towards Wellness Health Workplace</i>” in recognition of the commitment to the health and wellbeing of City of Windsor employees, retirees and family members</p>
	<p>Ashley Spetch</p> <p>Ashley Spetch, PhD, is Director, Organizational Wellness at Homewood Health. Her expertise lies at the intersection of psychology and business. She partners with organizations to influence change and facilitate growth. Ashley works in collaboration with human resources and diverse client groups to tackle matters such as leadership development, job fit, succession planning, employee psychological health, workplace conflict, and the human side of change.</p> <p>Ashley has over 10 years of experience in EFAP, management, consulting, and organizational development. Since joining Homewood Health in 2006, Ashley has contributed to numerous successful projects, and she has earned a reputation for creating integrated solutions to solve complex organizational challenges. Known for her commitment and contribution to the advancement of EFAP outcomes and service delivery, Ashley’s research has been recognized by both the American Psychological Association (APA) and I/O at work for its important implications for reducing absenteeism in organizations. Ashley’s experience spans a wide range of industries including several Fortune 500 corporations.</p> <p>Ashley received her B.A. in psychology from the University of British Columbia, and her M.Sc. in consulting psychology from Marshall Goldsmith School of Management, and her Ph.D. in consulting psychology from CSPP at Alliant International University.</p>
	<p>Mike Sullivan</p> <p>Mike Sullivan co-founded Cubic Health in 2003, and currently serves as the company’s President. Cubic Health is an independent health plan analytics and prescription drug plan management company based in Toronto. Cubic Health works with Canadian employers, plan advisors, provincial/territorial governments, insurance carriers, plan administrators, and service providers to optimize investments made in employee health benefits.</p> <p>Mike began his career as a community pharmacist in Saskatoon, and has previous experience working in the pharmaceutical and benefits consulting industries. He continues to maintain an active license to practice with the Ontario College of Pharmacists. Mike is a member of Benefits Canada’s Online Expert Panel, and serves as an Adjunct Professor at the University of Waterloo and the University of Toronto where he teaches in the areas of Management and Personal & New Venture Financial Management. Mike graduated from the College of Pharmacy at the University of Saskatchewan, and completed his Master of Business Administration degree from the Schulich School of Business at York University where he specialized in Finance.</p>



Paul Sywulich

Paul is Morneau Shepell's Vice President, Integrative Solutions and leads the organization's Innovation Centre. In this capacity he is responsible for developing integrative solutions which bring together the breadth of financial, physical, mental, and workplace health solutions of clients to maximize value of the underlying programs for employees and employers.

Paul has been with the firm for 21 years. Prior experience includes a key role in building Morneau Shepell's North American benefits administration solutions and working with a broad range of public and private sector clients to implement benefit and pension administration solutions. He currently resides in Toronto, and continues to work with Canadian and international clients to advance our solutions to fit their evolving needs.



Leah Warner

Leah is a Corporate Program Director with Employee Wellness Solutions Network which services 110 company locations across Canada. Her 25 years experience as a recognized leader and educator in the Canadian fitness industry have served as a great foundation to deliver high results in the field of employee wellness. Leah is a regular presenter and has done workshops for different groups and organizations such as Excellence in Manufacturing Consortium, HSPA chapters, Partners in Prevention, to name a few. Her work partnering with EMC earned a Finalist Nomination for the 2013 Health and Benefits Awards through Benefits Canada in the category of Strategic Partnership, and 3 finalist positions for other categories in 2014.

Leah's presentations bring the best mix of education and motivation that make for an enjoyable learning experience. Not only will you take away some great tips and information, but you will also leave with a desire to move forward with your personal health and wellness, and the momentum to make it happen. EWSNetwork provides strategic wellness programming focused on employee engagement and improved health behaviours. As of 2014, EWSNetwork engages 81% of all serviceable employees in at least one aspect of the wellness program, leading to enhanced participation, engagement, containment of benefits costs and overall evidence-based results.