



CPBI
SASKATCHEWAN
REGION

CANADIAN PENSION & BENEFITS INSTITUTE



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CPBI Saskatchewan News

Summer Newsletter - July/August 2016

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Message from the Chairperson



Summer in Saskatchewan brings warm sunny days, the beautiful scenery of fields in bloom, and the anticipation of vacation time with family and friends. Summer also brings our 2015/2016 CPBI program year to a successful conclusion. And what a year it has been!

The Program Committee provided us with a wide array of topics including meeting governance, investments, drug plan management, fraud, and our ever-popular economic outlook. Thank you to our Program Committee who worked so hard to put together a great year of learning and networking for all of us in Saskatchewan.

Evolution Through Innovation, our 2016 CPBI Saskatchewan Regional Conference, was an unforgettable event. So many great speakers shared their learnings and brought new insights for us to take back to our respective work places. The evening event featuring Jessica Holmes was both entertaining and fun. The Conference Committee knocked it out of the park once again. I give my congratulations and appreciation to the Conference Committee for a job well done.

On behalf of CPBI Saskatchewan Regional Council, I wish to extend our gratitude to all of the people who made 2015/2016 a success for our region. Thank you to all of the CPBI Saskatchewan Region council members. It is a privilege to work with such a diverse and talented group of industry professionals who commit themselves to ensuring education is a priority in our province. Thank you to all of the speakers who gave their time to prepare and present in Regina and Saskatoon. Thank you to all of our sponsors whose support and generosity allows us to offer quality education right here at home. And of course, thank you to all of you, our CPBI members and event attendees, it is your participation that makes our events a true success.

Work has already begun for 2016/2017. You can look forward to receiving information about our events beginning in early fall. I also want to call your attention to the exciting announcement that CPBI Forum, our national conference, will be held in Winnipeg in 2017. We hope that CPBI Forum being held in such close proximity will encourage and inspire many from Saskatchewan to attend. More information about CPBI Forum will be shared throughout the year.

For now, we wish you all a safe and happy summer. I look forward to seeing you at an upcoming CPBI Saskatchewan event.

Alana Shearer-Kleefeld

Chairperson

CPBI Saskatchewan Regional Council

Highlights from the CPBI Saskatchewan Regional Conference "Evolution Through Innovation"



On April 12 to 14, 2016, CPBI Saskatchewan Regional Council hosted its 6th annual conference at the Delta Regina Hotel in Regina, Saskatchewan. The conference kicked off on April 12 with a member appreciation event where conference attendees and CPBI Saskatchewan members got a chance to meet and network over wine and cheese. The following two-day conference event included a variety of plenary and breakout sessions focused on important innovations in both the pension and benefits industries.

Highlights from the event included Dr. Posen, Jessica Holmes, the breakout and luncheon speakers, and the many networking opportunities to meet and greet other colleagues from across the pension and benefits industries.

This year's Conference Planning Committee was pleased to receive acknowledgements from attendees both during and after the conference for the content and value received from the conference once again this year.



Jessica Holmes with CPBI Saskatchewan Regional Council Members

Back Row: Doug Volk, Dara Sewell-Zumstien, Bud Anderson, Jessica Holmes, Karen Lovelace (Administrator), Trina Kistner, Kendra Dumont, Alana Shearer-Kleefeld, Sylvia Rempel, Narinder Kempa. Front Row: Kelley Orban, Sheryl Armstrong, Bob Wilhelms



Networking at the 2016 CPBI Saskatchewan Regional Conference "Evolution Through Innovation"

Thank you!

Without the support from our sponsors, events like this would not be possible. We would once again like to thank the following organizations for their support:

2016 Conference Sponsors

Diamond:	Silver:	Bronze:
Desjardins Insurance	Phillips, Hager & North	Mercer
Group Medical Services	Aon	Triasima
Franklin Templeton Institutional	Lawson Lundell	iA Financial Group
	CIBC Mellon	Manulife
Gold:		Media:
Saskatchewan Blue Cross	Sun Life Financial	Benefits and Pensions Monitor
The Co-operators	Shepell	
	Homewood Health	

CPBI is a national organization with regional councils across Canada. We would like to extend our sincere appreciation to **Peter Casquinha**, CEO of CPBI, who attended our conference again this year. This is the third time Peter has attended since we began hosting our regional conferences six year ago. We are always thrilled to have representation from our national body at our conferences.

We would also like to extend our appreciation to **Joe Hornyak**, Executive Editor of [Benefits and Pension Monitor \(BPM\)](#) magazine, who attended the conference for his 6th consecutive year, and who wrote and published highlights about our conference. The recognition and participation that our event receives each year is due in part to the fantastic coverage that Joe provides in this distinguished national publication.



A big 'Thank-You' as well is extended to Bud Anderson (left) for accepting the role as Chair of the Conference Planning Committee, and for his dedication and commitment to planning this year's conference. As well, we extend a huge 'Thank-You' to all Council members who served on the Conference Planning Committee for their countless hours and efforts in the preparation of the conference.

Lastly, we would also like to thank all of you for supporting our event for the 6th year in a row. It is the generosity of our sponsors and the commitment of our members and conference attendees that made *Evolution Through Innovation* a resounding success.

Photo Credits: Sheryl Armstrong and Kendra Dumont

Welcome to our New Council Members!

CPBI Saskatchewan is pleased to welcome our new Council members:

<p>Dan Bolan</p>	<p>Dan Bolan is a new member of both CPBI and the Saskatchewan Regional Council. Dan is currently an Account Executive with Great-West Life and has 18 years of experience in account management of group benefit insurance. Dan has a Bachelor of Commerce degree with a specialization in risk management and insurance. He also has served as the Tournament Management Chair for Great-West Life's Charity Golf Classic Benefitting Hospitals of Regina for 8 years. Dan joined the Finance Committee and the Conference Planning Committee with CPBI.</p>
<p>Jeff McNaughton</p>	<p>Jeff McNaughton joined CPBI in 2011 and in addition to joining the regional council this year, he is on the Governance & Nominating Committee. Jeff is currently with the Saskatchewan School Boards Association in the role of Director, Employee Benefits and Insurance Plans, which is where he has been since 2010. Jeff also currently sits on the Municipal Employees Pension Commission. Prior to this, Jeff was the Benefit Plans Administrator for the SGEU LTD Plan and the SGEU Health and Welfare Trust for ten years. Jeff's educational background includes a Bachelor of Social Work, and he has obtained a Certified Employee Benefit Specialist designation from Dalhousie University.</p>
<p>Nikki-Lynn McKeague</p>	<p>Nikki-Lynn McKeague is the Manager of Group Life and Health at the Saskatchewan Teachers' Federation. She is a Certified Compensation Professional and a Global Remuneration Professional. She has been a member of CPBI since 2012 and in addition to joining the Saskatchewan Regional Council, she is also on the Professional Development Programs Committee and the Governance & Nominating Committee.</p>
<p>John Salmond</p>	<p>John Salmond is a new member to both CPBI and its Saskatchewan Regional Council this year. John is currently the VP of Sales and Marketing for Group Medical Services (GMS). He has over 25 years of experience in the financial services industry. John also serves on the Advisory Board for the Arthritis Society. John joined the Sponsorship & Membership Committee and the Communications Committee with CPBI.</p>
<p>Shaunt Parthev</p>	<p>Shaunt Parthev is a new member of both CPBI and its Saskatchewan Regional Council. Shaunt was called to the Saskatchewan Bar in 1987 and was appointed as Queen's Counsel in 2008. He currently practices law with the firm of MacPherson Leslie and Tyerman. His practice includes the representation of various professionals in benefit</p>

related claims, insurance defense including pension and benefit claims, and advising members of the insurance industry regarding procedures and obligations. Shaunt is frequently invited to present to insurance and financial planning groups regarding professional liability and loss prevention. Shaunt has joined the Sponsorship & Membership Committee and the Governance & Nominating Committee with CPBI.

Troy Shanks

Troy Shanks is a new member of the CPBI and its Saskatchewan Regional Council. He has been in the finance and insurance industry for the past 15 years, working with some of Western Canada's industry leaders. Troy currently holds the title of Vice President of Blackstone Insurance, Benefits and Bonding, with offices in both Saskatchewan and British Columbia. Troy has a Bachelor of Commerce, an Honours Degree, and a Bachelor of Arts and he holds his Canadian Accredited Insurance Broker designation. With CPBI, he currently serves on both the Conference Planning Committee and the Sponsorship & Membership Committee.

Andrea Johnson

Andrea Johnson is a lawyer with Miller Thomson LLP. Andrea's practice focuses on labour and employment law and commercial litigation. She was called to the bar in Saskatchewan in 2013. Andrea has Juris Doctor and a Bachelor of Commerce (majoring in Human Resource Management and Industrial Relations). Andrea Johnson is a new member of CPBI and its Saskatchewan Regional Council and also serves on the Professional Development Programs Committee and the Communications Committee with CPBI.

Regional Volunteer of the Year: Trina Kistner



Trina Kistner has been a member of CPBI since 2005 and joined council in 2007. Trina has participated on many of our committees over the past 9 years including Professional Development Programs, Communications, Governance & Nominating, and Conference Planning. She has served as the Secretary of Executive Council for the past 5 years and was the Chair of our very successful 2015 CPBI Saskatchewan Regional Conference *Connections & Creativity*. She also did a fantastic job as hotel liaison for our 2016 regional conference.

Trina has a very thoughtful and rational approach to things. She is a great listener and is always willing to help someone in need. She is always a calming voice on council.

In her day job, Trina is an Account Executive for Sun Life. She is a dedicated wife and a mom to twin daughters.

PHOTO: Alana Shearer-Kleefeld, Chair, CPBI Saskatchewan Regional Council (right) presents the 2016 Regional Volunteer of the Year Award to Trina Kistner (left). Photo credit: Kendra Dumont

2016-17 Calendar of Events

CPBI Saskatchewan Golf Tournament *New Event*

Tuesday, September 20, 2016

Royal Regina Golf Course, Regina

Luncheon/Breakfast Seminars

Regina: Venue to be determined!

Thursday, October 13, 2016 – Luncheon

Wednesday, November 16, 2016 - Breakfast

Thursday, January 19, 2017 – Luncheon

Thursday, February 16, 2017 – Breakfast

Thursday, March 16, 2017 – Luncheon

Thursday, May 18, 2017 - Luncheon ***New Event***

Saskatoon: Radisson Hotel Saskatoon

Wednesday, October 12, 2016 – Luncheon

Thursday, November 17, 2016 – Luncheon

Wednesday, January 18, 2017 – Luncheon

Wednesday, February 15, 2017 – Luncheon

Wednesday, March 15, 2017 – Luncheon

Wednesday, May 17, 2017 - Luncheon ***New Event***

Pension Plan Administration Certificate (PPAC) 3

Dates to follow.

This is the third of three modules through Humber College.

Member Appreciation/Networking Event *New Event*

December 2016. Exact date and location to follow.

Benefits, Beyond the Basics 2-day Seminar

Dates and location to follow.

2017 CPBI Saskatchewan Regional Conference "Path to Greatness"

April 25, 26 & 27, 2017 at TCU Place in Saskatoon

CPBI FORUM 2017 "Thriving in a Climate of Change"

June 5, 6 & 7, 2017 in Winnipeg, Manitoba

Watch for more exciting details about our 2016-17 Calendar of Events!

2016-17 Sponsorship Opportunities



CPBI Saskatchewan is pleased to announce our 2016-17 sponsorship program. Once again, this year's sponsorship package is designed to allow you the opportunity to maximize your sponsorship dollars. If you choose the option to sponsor both the 2016-17 program year and the 2017 regional conference, you are eligible to receive a **10% discount** if you apply by September 15, 2016.

We encourage you to take advantage of this opportunity to promote your brand to a diverse group of benefits, pension, investment and human resource professionals in the Saskatchewan region. With the various sponsorship packages available, your company has the flexibility to achieve its marketing objectives and stay within budget. Each package guarantees you excellent and ongoing recognition building up to and during the events.

The success of our programs and conferences is credited largely to our sponsors who lend their names and financial support. Join us for another exciting year of educational and promotional opportunities.

[Click here](#) to download the Sponsorship Brochure and Application Form.

CPBI Membership

Purchase your 2017 CPBI Membership now and receive a complimentary CPBI membership for the remainder of 2016!

[Click here](#) to learn about the advantages of being a CPBI member.

2016-17 CPBI Saskatchewan Regional Council & Committees

Chair: Alana Shearer-Kleefeld, 3sHealth

Vice-Chair: Dara Sewell-Zumstien, Public Employees Benefits Agency

Treasurer: Glenda Schlosser, Möbius Benefit Administrators Inc.

Secretary: Kelley Orban, Saskatchewan Healthcare Employees' Pension Plan

Past-Chair: Bob Wilhelms, Saskatchewan Blue Cross

National Board Representative: Doug Volk, Teachers' Superannuation Commission

Council Members:

Narinder Kempa, The Co-operators

Don Rowell, CUMIS Group Ltd.

Sylvia Rempel, University of Saskatchewan

Sheryl Armstrong, Hundseth Power Line

Dan Bolan, Great-West Life

Jeff McNaughton, Saskatchewan School Boards Association

Nikki-Lynn McKeague, Saskatchewan Teachers' Federation
John Salmond, Group Medical Services
Shaunt Parthev, MacPherson Leslie and Tyerman LLP
Troy Shanks, Blackstone Insurance, Benefits & Bonding Inc.
Andrea Johnson, Miller Thomson LLP

Finance Committee

Chair, Glenda Schlosser
Bob Wilhelms
Sheryl Armstrong
Dan Bolan
Dara Sewell-Zumstien
Alana Shearer-Kleefeld

Professional Development Programs Committee

Co-Chair, Kelley Orban
Co-Chair, Sylvia Rempel
Glenda Schlosser
Don Rowell
Nikki-Lynn McKeague
Andrea Johnson
Dara Sewell-Zumstien
Alana Shearer-Kleefeld

Governance and Nominating Committee

Chair, Bob Wilhelms
Doug Volk
Kelley Orban
Nikki-Lynn McKeague
Shaunt Parthev
Jeff McNaughton
Dara Sewell-Zumstien
Alana Shearer-Kleefeld

Communications Committee

Chair, Don Rowell
Kelley Orban
John Salmond
Andrea Johnson
Dara Sewell-Zumstien
Alana Shearer-Kleefeld

Sponsorship and Membership Committee

Chair, Narinder Kempa
Don Rowell
Sheryl Armstrong
Glenda Schlosser
Shaunt Parthev
Troy Shanks
John Salmond
Dara Sewell-Zumstien
Alana Shearer-Kleefeld

Conference Planning Committee

Chair, Sheryl Armstrong
Vice-Chair, Kelley Orban
Sylvia Rempel
Glenda Schlosser
Narinder Kempa
Troy Shanks
Dan Bolan
Gail Genest, Saskatchewan Pension Plan
Dara Sewell-Zumstien
Alana Shearer-Kleefeld

Would you like to get involved?

If you are interested in volunteering on Council, participating on a committee, or providing a presentation at one of our seminars, let us know!

Please send your questions and submissions, along with your contact information, to our regional administrator, Karen Lovelace, at saskatchewan@cpbi-icra.ca, or to one of our council members.

A strong, active Council means high-quality professional development programs for Saskatchewan CPBI members.

Thank you for considering volunteering with CPBI.

Connect with us!

Email: saskatchewan@cpbi-icra.ca

Phone: (306) 757-1013

Website: www.cpbi-icra.ca

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