CANADIAN PENSION & BENEFITS INSTITUTE

CPBI SASKATCHEWAN REGION

Benefits, Beyond the Basics

December 4 & 5, 2018 – Radisson Hotel Saskatoon

Join us for a full program addressing in-depth aspects of Group Benefits Plans, current trends and emerging issues. This 2-day seminar will provide a comprehensive framework that will enhance your understanding of benefits, act as a primer for the CEBS program, and offer valuable continuing education credits for the Insurance Council of Saskatchewan. This is also an excellent opportunity to network with fellow participants and event speakers. Attendees will receive a binder of presentation material and certificate of completion.

AGENDA

Tuesday, December 4, 2018

9:30-9:50am **Registration, Muffins and Refreshments**

9:50-10:00am **Opening Remarks**

10:00-11:30am **Session 1: Roles and Responsibilities**
This session examines the roles and responsibilities of insurance carriers, employers, and employees. You will be provided with information on what your rights and expectations are as the policyholder, administrator, employee. Focus will be on what's in (or not included in) the insurance contract and why those provisions are there. This presentation will set the stage for the rest of the seminar.
Speaker: **Alana Shearer-Kleefeld**, Director, Employee Benefits, 3sHealth

11:30-12:30pm **Lunch**

12:30-2:00pm **Session 2: Claims Administration**
This session provides an overview of Claims Administration for all product lines: Life Insurance, Short/Long Term Disability, and Health and Dental. What happens when a plan member makes a claim? What technological advances have been made? How can claim administration be made more efficient? The session will also outline the plan member's experience; the plan sponsor's expectations; who is paid and when; and how carriers protect the future of the plan and control costs.
Speaker: **Dan Bolan**, Account Executive, Saskatchewan Group Sales and Service Office, Great-West Life

2:00-2:30pm **Refreshment Break**

2:30-4:00pm **Session 3: Flex Benefits: The Past, Present & Future**
This session will focus on the fundamentals of flexible benefits including details on considerations in the design, administration and pricing of flexible arrangements. The session will include a discussion on an array of design options in adding flexibility to a plan, including flexible spending accounts, modular plans and cafeteria style plans.
Speaker: **Sherri Welk**, Account Manager, Group Benefits, Co-operators Life Insurance Company

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Wednesday, December 5, 2018

8:15-8:45am — **Breakfast**

8:45-10:15am — **Session 4: Funding**

How are premiums set? What is the role of a group's experience rating? How is a plan's cash flow monitored? How is the insurance company selected? What criteria should be employed? When should the plan sponsor self-insure? This session examines these and other issues relating to the financial management of benefits plans.

Speaker: **Lucian Schulte**, Senior Vice President, National Health Analytics Leader, Aon

10:15-10:45am — **Refreshment Break**

10:45-12:15 — **Session 5: Emerging Issues**

Absenteeism, presentism, mobile technology, wellness programs, millennials, managed drug formularies… the buzz words surround us. But what does that mean for the world of benefits? Are we headed for a benefit meltdown or what will the next 5 years bring? This provocative session will kick start your thinking as we look into the future.

Speaker: **Debra L. Wiegers**, Group Benefits Consultant, Wiegers Financial & Benefits

12:15-1:15pm — **Lunch**

1:15-2:45pm — **Session 6: Total Compensation/Total Rewards**

What are total rewards and why they are important to organizations? This presentation will answer these questions, explore the types of total rewards models, and discuss how to implement a program that aligns with market conditions.

Speaker: **Shannan Corey**, Director, Total Rewards, Human Resources, Federated Co-operatives Limited

2:45-3:00pm — **Closing Remarks**

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SPEAKER BIOGRAPHIES

Alana Shearer-Kleefeld
Director, Employee Benefits, 3sHealth

Alana Shearer-Kleefeld is the Director of Employee Benefits at Health Shared Services Saskatchewan (3sHealth). Alana and her team are responsible for the management and investments of ten employee benefit health and welfare trusts representing over $500M in assets. Committed to providing a world class customer service experience to 44,000 active plan members and 10,000 retirees, Alana oversees all aspects of daily operations including governance, benefit administration, systems, and disability adjudication. Alana's career in benefits spans over 25 years and in addition to her public sector experience, she worked for several insurance companies including Confederation Life, Crown Life, Canada Life, Great West Life and The Co-operators. As a CPBI Member since 2006, Alana joined the Saskatchewan Regional Council the very same year; that's dedication for you! Now retired from Council, during her tenure Alana filled a variety of roles including: Executive Secretary, Chairperson of several committees within Council including two terms as the Saskatchewan Regional Conference Chair, member of a variety of National Council committees, two terms as the Saskatchewan Regional Council Vice-Chair, and one term as Saskatchewan Regional Council Chair. Alana brings a unique perspective through her years of being involved in CPBI, both at the regional and national levels, and along with her desire to give back to the benefits community.

Dan Bolan
Account Executive, Saskatchewan Group Sales and Service Office, Great-West Life

Dan Bolan is an Account Executive in the Saskatchewan Group Sales and Service Office at Great-West Life. Dan has 20 years of experience in the group benefits industry and works with medium-sized to large employers in the province of Saskatchewan. Dan has his Bachelor of Commerce degree in Risk Management and Insurance and achieved the Certified Employee Benefits Specialists (CEBS) designation in 2005. He was past tournament management chair for the Great-West Life Charity Golf Classic benefiting the Hospitals of Regina Foundation and is a former Council member for CPBI Saskatchewan.

Sherri Welk, B.A., B Comm., CLU RHU
Account Manager, Group Benefits, Co-operators Life Insurance Company

Sherri Welk is the Account Manager of Group Benefits at Co-operators Life Insurance Company in Saskatchewan. She has worked in the group benefits industry for over 24 years in a variety of roles. Originally from Winnipeg, she spent several years with a major life insurance company as an Employee Benefits Specialist and Benefits Manager in British Columbia and Manitoba. She has resided in Saskatchewan for the past 19 years where she has had several different opportunities including managing a large brokerage companies' employee benefits division, and owning her own business as an independent benefits consultant. She is married to her best friend Bill, and they have 3 busy, happy children. Her favorite place to be besides watching her children play soccer, basketball and figure skate is watching the sunset over Katepwa Lake.

Lucian Schulte, FCIA, FSA
Senior Vice President, National Health Analytics Leader, Aon

Lucian Schulte is a Senior Vice President of Aon's Health & Benefits practice and the national leader of Aon's Health Analytics team. Lucian leads a team developing new solutions to drive greater insight into the underlying drivers of benefits programs. Using predictive analytics, machine learning, and data science, the analytics team provides decision support for benefits programs and assists clients with identifying the opportunities within their programs.

Lucian has eleven years of industry experience working in an actuarial consulting capacity for health and benefits clients across Canada. He has worked with several clients providing expertise on plan design, pricing, valuation, and actuarial modeling, utilizing predictive analytics and data science. His work also includes consulting to a number of trusts and self-insured disability plans.

Lucian is a graduate of the University of Alberta with a Bachelor of Science degree in honors mathematics. He is a Fellow of the Society of Actuaries and a Fellow of the Canadian Institute of Actuaries. Lucian currently volunteers with the Society of Actuaries e-Learning Assessment Development Team.

Debra L. Wiegers, GBA, CFP, CLU, CH.F.C.
Group Benefits Consultant, Wiegers Financial & Benefits

Deb Wiegers is Wiegers Financial & Benefits' highly energized Vice-President and the head of the firm's Group Benefits Consulting Division. She has specialized in group benefits since 1991 and provides advice to some of the top businesses in Saskatchewan, Alberta, Manitoba, and elsewhere in Canada. Having obtained her GBA, CFP, CLU, and CH.F.C., her knowledge and expertise are valuable assets to her clients.

Deb and her team of 13 benefit advisors and support staff play a vital role in helping their 600+ group clients become - and remain - employers of choice by providing their employees and families with the group benefit and retirement plans they want. Deb's knowledge of the products available in the marketplace allows her to provide an individualized package built specifically to meet each client's needs. Her experience, education, and enthusiasm for doing the best for her clients consistently place her at the top of her profession.

Deb is well known around the Saskatoon community, and dedicates significant time and resources to many philanthropic and charitable initiatives, particularly Wiegers Financial & Benefits' in-house charity, Wiegers Care for Kids. The charity raises money for local children's charities, the primary beneficiary of which remains Jim Pattison Children's Hospital Foundation.

Shannan Corey
Director, Total Rewards, Human Resources, Federated Co-operatives Limited

Shannan Corey has been the Director of Total Rewards at Federated Co-operatives Ltd. (FCL) since August 2015. Shannan is responsible for providing leadership to the Co-operative Retailing System (CRS) in the development and delivery of a comprehensive total rewards program in support of our overall talent management strategies. This includes overseeing the implementation and administration of various strategic total rewards offerings including compensation, group benefits, pension plans and recognition programs for approximately 25,000 employees across both the wholesale (FCL) and retail (CRS) sides of the organization. Shannan was previously in consulting for 28 years, including four years with Koenig and Associates in Saskatoon in various roles as a compensation consultant as well as 24 years with Aon Hewitt in Saskatoon in various roles as a pension consultant. Shannan has a Bachelor of Science degree in Mathematics and Statistics from the University of Saskatchewan, a Certified Professional Human Resources (CPHR) designation, as well as possessing her accreditation as an Associate Pension Actuary.