



2023 CPBI SASKATCHEWAN REGIONAL CONFERENCE

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EXPEDITION

#JOURNEYWITHPURPOSE

April 18 - 20, 2023
Sheraton Cavalier, Saskatoon

AGENDA

Tuesday, April 18, 2023

5:00 PM - 6:00 PM	Cocktails	Centre
6:00 PM - 7:00 PM	Dinner	Centre
7:00 PM - 8:00 PM	Keynote A	Centre

Wednesday, April 19, 2023

7:15 AM - 8:00 AM	Breakfast	Centre
8:00 AM - 8:15 AM	Opening Remarks	Centre
8:15 AM - 9:15 AM	Keynote B	Centre
9:30 AM - 10:30 AM	Breakout #1	West/South
10:30 AM - 11:00 AM	Wellness Session	Foyer
11:00 AM - 12:00 PM	Breakout #2	West/South
12:00 PM - 12:45 PM	Lunch	Centre
12:45 PM - 1:45 PM	Keynote C	Centre
1:45 PM - 2:00 PM	AGM	Centre
2:15 PM - 3:15 PM	Breakout #3	West/South
3:15 PM - 3:45 PM	Wellness Session	Foyer
3:45 PM - 4:45 PM	Breakout #4	West/South
4:45 PM - 6:30 PM	Wine + Cheese Reception	Centre

Thursday, April 20, 2023

7:15 AM - 8:00 AM	Breakfast	Centre
8:00 AM - 9:00 AM	Keynote D	Centre
9:15 AM - 10:15 AM	Breakout #5	West/South
10:15 AM - 10:45 AM	Wellness Session	Foyer
10:45 AM - 11:45 AM	Breakout #6	West/South
11:45 AM - 12:30 PM	Lunch	Centre
12:30 PM - 1:30 PM	Keynote E	Centre
1:30 PM - 1:45 PM	Closing Remarks	Centre



Title Sponsor



As our title sponsor, Saskatchewan Blue Cross powers the entire conference, including breakfasts, lunches & dinner.

Saskatchewan Blue Cross is a local, not-for-profit organization that puts people and community at the heart of every interaction. We've been serving the health insurance needs of Saskatchewan residents for over 75 years—and we're just getting started.

Built on trust, focused on service

When we first opened our doors as a not-for-profit organization in 1946, we were just seven doctors who saw a better path — we wanted people to have equal access to essential healthcare services. Fast forward to today, and we've helped to lay the foundations for health insurance in Saskatchewan, proudly delivering exceptional health and wellness benefits, travel insurance, and life insurance solutions to more than 200,000 people, including more than 1,000 employers who trust us to support their workplace benefits.

More than 75 years of serving Saskatchewan

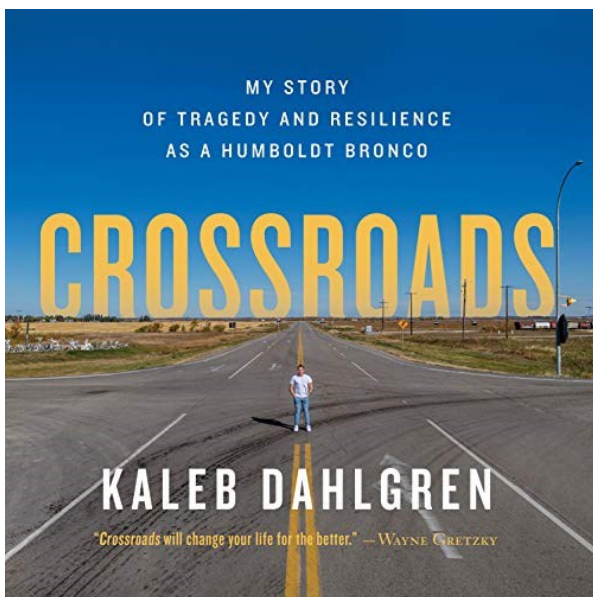
CPBI Saskatchewan Regional Council would like to extend a huge thank you to Saskatchewan Blue Cross for all of their support over the years and into the future!



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Keynote A

Tuesday at 7:00 PM

Sponsored by:



Investor & Treasury Services

Randy's Take on Leading Change

Randy Ambrosie
CFL Commissioner (2017- Present)
Grey Cup Champion
Keynote Speaker
Business Leader

CFL Commissioner Randy Ambrosie shares his unique experiences, keen insights and timely advice on embracing and leading the dramatic change every business, workplace and organization is grappling with today. Leaning on his successful careers as an outstanding athlete, financial sector CEO and Commissioner of a leading sports league – one with a huge national profile and an ambitious global strategy – Randy reveals how you can be bold and get “buy in” at the same time. Known for his self-deprecating humour and boundless energy, you can count on this former Grey Cup Champion, and business winner, to entertain as well as enlighten.





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Keynote B

Wednesday at 8:15 AM

Sponsored by:



Post Pandemic: Emerge from the darkness

Kaleb Dahlgren

#1 Bestselling Author, Crossroads

Inspiring Community Leader & Mental Wellness Advocate

Kaleb Dahlgren beats the odds. Diagnosed with Type 1 Diabetes at the age of four, Kaleb was told by coaches and scouts that he would never succeed in hockey. Instead of defeat, Kaleb used the negativity as motivation. He worked relentlessly and played the highest level of hockey each year of his career. His own struggles inspired him to create the program Dahlgren’s Diabeauties. This mentorship program sheds light on Type 1 Diabetes and provides physical, mental, and emotional support for children living with the disorder. After losing 16 members of his Humboldt Broncos family and surviving the tragic crash, he continued to give back and help the community of Humboldt heal. Kaleb was recognized and received the Canadian Volunteer Award for Emerging Leader of the Prairies in 2018 due to his relentless community work. Despite living with a severe traumatic brain injury from the Humboldt Broncos crash that has left numerous neurologists and doctors speechless - Kaleb has enjoyed the grind. Graduating from York University with a Commerce Degree and being named the Most Outstanding Male Graduate for Varsity Athletics - along with York University Class of 2021 Valedictorian and the 2022 Top 30 Under 30 Changemakers designation, Kaleb is forging his next path as a Doctor of Chiropractic student and International Keynote Speaker! Today, Kaleb is a **#1 National Bestselling Author with his recent memoir *Crossroads*** - and is an inspiring community leader who just received the Queen Elizabeth II Platinum Jubilee Medal for Saskatchewan, a mental wellness advocate, and diabetes advocate!





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Breakout #1

Wednesday at 9:30 AM

Sponsored by:



Pension (South)

Will recent correlation changes between bonds and stocks cause a diversification dilemma?

Chris Koltek, MBA, CFA, Institutional Client Portfolio Strategist, Portfolio Solutions Group, Canada Life Investment Management Ltd.

Janet Salter, CFA, Vice President and Portfolio Manager, Portfolio Solutions Group, Canada Life Investment Management Ltd.

Janet and Chris will discuss the historic correlations between stocks and bonds in Canada, how this relationship changed in 2022, and some of the implications for Canadian multi-asset managers going forward.

Benefits (West)

Group Benefits Evolution: Navigating the Changing Landscape and Emerging Trends

Ryan Duesing, Partner, Mercer Canada
Tim Kane, Chief Executive Officer, myHSA
Kenzie Bergeron, AVP, Sales, Saskatchewan Blue Cross

With the war on talent, Group Benefit packages help attract and retain talented employees and are an affordable way to enhance your companies total compensation package. However, it is important to be aware of the evolving benefits landscape and trends so that your Group Benefits Plan meets the needs of your employees and their families health and wellbeing.

If you are a Human Resource Professional, Benefits Manager, and/or Plan Sponsors seeking to stay ahead of the curve in the rapidly changing group benefits landscape, join us for this session which will feature three industry experts who will share their thoughts and experience on emerging trends, the evolving landscape and custom benefit solutions.

Attendees will leave this session with a deep understanding of the changing benefit landscape and be provided with the tools and strategies they need to create effective and innovative Group Benefit Packages that meet the evolving needs of their employees.



Wellness Session #1

Wednesday at 10:30 AM

Sponsored by:



Let's enjoy a wellness session, step back, relax, and recharge our body and mind.

Shelley Turk
Owner/Functional Aging Specialist





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Breakout #2

Wednesday at 11:00 AM

Sponsored by:



Pension & Benefits (South)

Rethinking the Member / Client Experience: Harnessing the Power of Design Thinking to Drive Engagement and Outcomes

Jeffrey Boutilier, President, Ascent Strategy
Tami H. Dove, Director, Member Experience, CSS Pension Plan

The challenge of building member / client engagement has never been greater. Consumer expectations have evolved dramatically, and the range of service experiences offered across the financial services landscape grows more complex every day. This session will explore human-centered approaches to generating more points of interaction with members, and for making existing interactions richer. Participants will take away a new framework for considering how product and operational choices shape the member / client experience.

Benefits (West)

A Holistic Approach to Workplace Health & Wellness

Garry Derenoski, President & CEO, Bridges Health

Employee wellness has always played a part in employee engagement, productivity and overall business success. Organizations are increasingly looking to adopt programs and services that assist and support individuals and employers who are struggling with managing presenteeism, absenteeism, injury, illness, mental health, and individual rehabilitation. We know the debilitating effect these challenges can have on employee wellbeing and overall productivity.

Bridges Health is one of the nation's finest multidisciplinary workplace wellness resources, offering holistic health and wellness strategies and solutions within organizations across North America. We aim to build and support healthy people, safe workplaces, and strong communities through compassionate interactions, effective teamwork, and a commitment to innovation and versatility.

This session will highlight the early intervention strategies, psychological health and safety initiatives, employee health support, injury prevention programs, return-to-work and stay at work coordination that can reduce and address presenteeism, absenteeism, injury, illness, mental health, and individual rehabilitation in the workplace.



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Keynote C

Wednesday at 12:45 PM

Sponsored by:



Tragedy to Triumph: finding light in the darkness.

Jess Tetu

Serial Entrepreneur + Public Speaker + Philanthropist

Canada's Top 40 under 40 + 2019 Canada's Most Powerful Women

Overcoming adversity at a very young age, Jess began her life on her own at the age of 15 years old and through dedication, determination, and hard work, has become a national award-winning philanthropist & entrepreneur.

Jess is the sole owner of five Just For You Day Spas in Saskatchewan & Alberta, Founder & CEO of Lia Reese Canada, (Saskatchewan's Beauty Brand), Founder & CEO of Iconic Betty Jewelry, Founder of Jess Tetu Consulting, and Founder & CEO of 4seventy One Recovery Resources, a not-for-profit charity she created.

She was named one of Canada's Top 40 Under 40, awarded the SK Entrepreneur of the Year Award, honored with the YWCA Women of Distinction Award, and most recently received one of Canada's most coveted awards when she was named one of Canada's Most Powerful Women.

Jess will leave you inspired, motivated to improve your outlook on life & to find light in dark situations!





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Breakout #3

Wednesday at 2:15 PM

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 **TELUS**[®] Health

Pension & Benefits (South)

Recent Benefit & Pension Law Developments

Meghan Popp, Partner, Lawson Lundell LLP

Meghan will review recent case law and statutory developments of interest to the sponsors and administrators of Saskatchewan pension and benefit plans. Topics addressed will include the proposed amendments to the Pension Benefits Act in Bill 108, as well as recent case law on age limits in long term disability plans and spousal status verification by pension plan administrators.

Benefits (West)

Current Labour Realities and the Implications to Business. How to mitigate the impact?

Hanif Hemani, Managing Director, Express Employment Professionals

Hanif will outline the current state of affairs in Saskatchewan and Canada and what are some of the causes for the current realities we are facing. More importantly, what are the implications of these realities, and what the gaps that businesses must address moving forward to mitigate the impact of these realities.



Wellness Session #2

Wednesday at 3:15 PM

Sponsored by: **FASKEN**

Let's enjoy a wellness session, step back, relax, and recharge our body and mind.

Shelley Turk
Owner/Functional Aging Specialist





Breakout #4

Wednesday at 3:45 PM

Sponsored by:



Pension (South)

Converting Retirement Savings to Lifetime Income - A Prescription to Help Canadians Navigate their Retirement Income Needs

Martin McInnis, Executive Director, Co-operative Superannuation Society Pension Plan

A very significant number of Canadians are reaching their retirement years (or are there already), many of whom hold their entire workplace retirement savings in capital accumulation plans (CAPs). These individuals are responsible to ensure their workplace CAPs and other retirement savings will provide them with adequate and sustainable income for the rest of their lifetimes. There is an urgent need for change to provide retiring Canadians who are members of CAPs the best opportunity to create financial security for themselves in retirement. We'll highlight six calls to action that build on the momentum achieved in recent years to get decumulation right in Canada.

Benefits (West)

Disability Insights - Collaboratively Navigating Post Pandemic

Caralee Chorney, Disability Management Consultant, Manulife

It is no secret our world has significantly changed in the last few years as we experienced a global pandemic. Caralee will walk through the effects of COVID as it relates to disability trends on Mental Health and other diagnoses before, during and current, including external challenges and ways to continue partnering together to support members.



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Wine & Cheese Reception

Wednesday at 4:45 PM

Sponsored by:



“Cheese The Day”

David Beaudoin
Canadian Cheese Ambassador

The ultimate ‘cheesy’ experience!!! The only thing better than Canadian cheese is more Canadian cheese paired with spectacular wine!

Join David Beaudoin ‘Canadian Cheese Ambassador’ in this Canadian cheese and wine tasting experience. Expect high energy, story-telling, entertainment, and fun knowledge as you go through each cheese course.

David is committed to helping people understand why it is so important to support our very own cheese makers and milk producers and demonstrates this by seeking out pairings found in our local markets. He has traveled all over this beautiful country, educating audiences about the wonder, delight and the **MAGICAL SPLENDOR** of each carefully selected pairing and is looking forward to having this same experience with you.

Come and learn about the marvelous and complex world of Canadian cheese. We invite you to **“Cheese The Day”** with David! It is fun, educational, engaging, and **tasty for all!!!!**





Keynote D

Thursday at 8:00 AM

Sponsored by:



Manulife

The Power and Possibility of Influence

Margaret Palmer

Speaker/Trainer

TACFORM Training & Development

Leadership is not a skill, a set of inspiring words, or a great speech. It is more fundamental, more basic, and more permanent than that. It is *a way of being*, and it is not reserved only for those who carry titles or sit in the corner office. In this inspiring keynote, Margaret challenges the audience to focus on influence rather than impression, celebrate character over credentials, and embrace the importance of communicating to connect by engaging with people in a way that makes them feel valued and appreciated. Be prepared to let go of the traditional paradigms of leadership, to question what it truly means to lead, and to consider the great possibility that lies within each of us.





Breakout #5

Thursday at 9:15 AM

Sponsored by:



Pension (South)

ESG and Climate Change: Fiduciary Considerations for a Journey with Purpose

Deron Waldock, Lead Partner, McCarthy Tetrault

The Canadian Supreme Court held on 25th March, 2021 that “Global climate change is real, and it is clear that human activities are the primary cause.” Faced with this inconvenient truth, what are a plan administrator’s responsibilities as a pension fund fiduciary? This session will explore this new and developing area of law, including:

- What’s new in terms of legislation, disclosure practices and reporting metrics?
- Should we have more robust pension standards legislation around Environmental Social Governance (ESG) or Climate Change Investment Issues – like those introduced in the UK?
- Should plan members have a say?
- What is the liability risk?
- What are the disclosure rules and ESG best practices and Climate change metrics.

Pension & Benefits (West)

Inclusion and Diversity: Changing the Story

Mark Mervyn, FSA, FCIA, Pension Actuary, Partner, AON
Shelley Russell, Vice President, AON

Intentions Matter. Outcomes Matter.

It’s easy for companies to say that Diversity Equity and Inclusion (DEI) is important and a priority – but how do you translate words into action? And how do you integrate DEI objectives into your pension and health programs, and the broader organizational strategy and culture, to demonstrate commitment.

Key to integration is evolving the DEI conversation to have an impact that maximizes synergy across your Total Rewards and Environmental Social Governance (ESG) objectives, supporting diverse needs of employees and providing an optimized experience.

Please join us for an engaging discussion where we will explore how to bring all the pieces together to make a difference. Highlighting Governance, Design and Communication, we will explore best in class strategy and share practical ideas to build inclusive health and pension plans.



Wellness Session #3

Thursday at 10:15 AM

Sponsored by:

ECKLER

Let's enjoy a wellness session, step back, relax, and recharge our body and mind.

Shaunda Arsenie
Clinic Director
Physical Therapist

SASKATOON
Physioga
Recover. Rebuild. Recharge.



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Breakout #6

Thursday at 10:45 AM

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Pension (South)

Measuring member outcomes, retirement success, communications in the pension world

Kelly Snowden, Director of Pension Administration, Public Employees Benefits Agency
Jennifer Katzsch, Regional Vice-President, Business Development and Client Relations, Western Canada, Desjardins Insurance

How do recordkeepers and administrators use measurement and monitoring to foster financial wellness and increase probable outcomes for plan members?

If the bigger goal of the journey is financial wellness in retirement, measuring engagement, points-in-time and member outcomes brings purpose to the journey. Especially for members of defined contribution pension plans, measuring and monitoring engagement, risks and outcomes is imperative for an administrator to support members in the achievement of their retirement targets.

In this session, Desjardins will present their approach in supporting plan sponsors on engaging their employees throughout the accumulation phase and the Public Employees Benefits Agency will share the methods and tools used by their pension board to measure risks to member outcomes and income adequacy in retirement.

Benefits (West)

What does good workplace mental health look like now?

Caylee Stewart, Senior Customer Success Manager, TELUS Health (formerly Life Works)

Workplaces, and employee needs are always evolving, but this evolution has been fast forwarded, which has created many concerns.

This session will cover the complexity of mental issues related to the younger employees and their needs in terms of benefits and services, their view of work, and the factors that do and do not motivate the current workforce. The session will also help organizations understand what good workplace mental health looks like now and why their impact is increasingly visible.



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Keynote E

Thursday at 12:30 PM

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Confronting Prejudice: Removing Unconscious Biases

Ernie Louttit

Honesty + Integrity + Leadership

“No person is ever free of prejudice, but how a person manifests their prejudice is the test of their morality”. Ernie reminds us that cultural and media narratives have the ability to shape our impressions about individuals we have never met. Managing those biases is a crucial skill in our increasingly multicultural society.

Ernie teaches audiences the importance of:

- Sharing the responsibility of leadership between the police and community
- Seeing beyond what you see day to day and adopting the “invisible people”
- To have empathy for people, even when they are making choices you don’t agree with





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