

CPBI WESTERN REGIONAL CONFERENCE 2018



POWER OF
THE **PAST**

FORCE OF
THE **FUTURE**

2018 CONFERENCE GUIDE

The Canadian Pension and Benefits Institute (CPBI) is a national organization of over 2,800 industry leaders and professionals, representing all sectors of our economy.



THANK YOU TO OUR SPONSORS

For their generous and continued support which makes this conference possible.

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RETIREMENT, BENEFITS AND INVESTMENT EDUCATION

Discover our lessons from the past and learn new approaches to use these lessons for future challenges you face, all while collaborating with peers who are dealing with similar issues. Welcome to the CPBI Western Regional Conference!

The Western Regional Conference is a unique opportunity for networking and learning alongside colleagues who share a sense of common purpose. Over the next three days you will benefit from past experiences and expert advice for the future. The world of benefit plans, retirement plans and investments is ever changing and CPBI is here to help plan sponsors ensure your plan is up to date and competitive, to help providers understand the needs of plan sponsors and help consultants and advisors tie it all together.

Our CPBI committees have also harnessed the power of the past and have been working for the past 12 months to put together a program and experience that is forward-looking and will position you for the opportunities of the future.

Attendees of the Conference include:

- » Human resource professionals responsible for all types of retirement and benefit plans
- » Plan trustees and administrators
- » Public sector plan trustees and executive directors
- » Fund administrators and managers
- » Benefits consultants
- » Fund professionals—lawyers, accountants, actuaries
- » Investment managers and consultants
- » Others who are involved in the overall management of retirement and benefit programs.

Target Your Learning Needs

- » Access to 15 plenary sessions and 5 keynote speakers
- » Access to comprehensive electronic take-home materials, resources and references
- » Insights from over 35 speakers
- » Interactive workshops—Get answers straight from the experts
- » Extensive networking opportunities with more than 150 attendees
- » Conference sessions are geared toward participants with all levels of experience and background.

Validate your Attendance!

- » Enjoy the opportunity of selecting from 15 sessions
- » A Continuing Education (CE) attendance certificate will be issued to each registrant whose attendance is verified.
- » Attendees must sign in and out for each session.
- » CE credits can be used for various professional designations and licences.

CONFERENCE SCHEDULE Eligible for CE credits

DAY ONE – Wednesday April 11			
11:00 AM	Conference Registration Desk Opens		
1:50 PM	Opening Comments from Co-Chairs Kristin Smith and Sharon Vognrietz Room: Wildrose Salon B/C		
2:00–3:10 PM	Keynote Innovation and Technology: A Global Success Story Marcos Lopez, CEO, Solium Room: Wildrose Salon B/C		
3:10–3:30 PM	Networking Break / Sponsor Showcase		
3:30–4:45 PM	People Session #1 Putting the “i” in TEiAM Room: Hawthorn A	Technology Session #2 Financial Wellness at Work: Transitioning Employees to a Self-Service Environment Room: Hawthorn B	Compliance Session #3 How to Give Your Fund Line Up the TLC it Deserves Room: Hawthorn C
4:45–5:30 PM	Open Time		
5:30–7:30 PM	Cocktail Reception Room: Wildrose Prefunction Space		

CONFERENCE SCHEDULE

DAY TWO – Thursday April 12

7:00–8:30 AM	Breakfast Room: Wildrose Salon A		
8:30–9:40 AM	Keynote Truth, Reconciliation and YOU! Bee Calliou Schadeck, Senior Aboriginal Advisor Room: Wildrose Salon B/C		
9:40–10:00 AM	Networking Break / Sponsor Showcase		
10:00–11:10 AM	People	Technology	Compliance
	Session #4 Paying for Value: Focus on High Quality Pharmacy Care Room: Hawthorn A	Session #5 Driving Culture into the New Era Room: Hawthorn B	Session #6 Decumulation: It's All Downhill From Here Room: Hawthorn C
11:10–11:30 AM	Networking Break / Sponsor Showcase		
11:30 AM–1:30 PM	Lunch Speaker Inspiring Workplaces: The Way Work OUGHT To Be! Michael Kerr, Author and Speaker Room: Wildrose Salon B/C		
1:30–1:45 PM	Networking Break / Sponsor Showcase		
1:45–3:00 PM	People	Technology	Compliance
	Session #7 Putting Creativity and Innovation to Work Room: Hawthorn A	Session #8 Beyond Traditional Asset Classes Room: Hawthorn B	Session #9 The Sustainable Path Forward Room: Hawthorn C
3:00–3:20 PM	Networking Break / Sponsor Showcase		
3:20–4:30 PM	People	Technology	Compliance
	Session #10 The Future's Illuminated Solution: Pharmacogenetics Room: Hawthorn A	Session #11 Artificial Intelligence Room: Hawthorn B	Session #12 Beyond Traditional Asset Classes: An Employer's Experience Room: Hawthorn C
4:30–5:00 PM	Open Time		
5:00–6:00 PM	Cocktail Reception Room: Wildrose Prefunction Space		
6:00–10:00 PM	Gala Dinner and Entertainment by 5 on the Side Room: Wildrose Salon A/B		

CONFERENCE SCHEDULE

DAY THREE – Friday April 13

7:00–8:30 AM	Breakfast Room: Wildrose Salon A		
8:30–9:40 AM	Keynote Mending the Gap! Bold Insights from The World Economic Forum Jaqui Parchment, Senior Partner, Mercer Room: Wildrose Salon B/C		
9:40–10:00 AM	Networking Break / Sponsor Showcase		
10:00–11:10 AM	People	Technology	Compliance
	Session #13 The Legalization and Regulation of Cannabis Room: Hawthorn A	Session #14 A First of its Kind Annuity Transaction – Husky’s Case Study Room: Hawthorn B	Session #15 Disability Cost Management: Trends and Legal Considerations Room: Hawthorn C
11:10–11:30 AM	Networking Break / Sponsor Showcase		
11:30–1:30 PM	Keynote Changing My Mind Margaret Trudeau, Mental Health Advocate Room: Wildrose Salon B/C		
1:30 PM	Closing Comments from Co-Chairs and Next Conference Chair		

KEYNOTE SPEAKERS

Marcos Lopez

Innovation and Technology: A Global Success Story



Like most people in stock plan administration, Marcos sort of “fell into it.” In 1999, he started Bitontic Solutions and was contracted by the newly formed Solium to build an equity administration platform—known today as Shareworks. What started as a bit of contract work soon became a life-long professional passion for Marcos. Marcos holds a Bachelor’s Degree in Computer Science from the University of Calgary. Now as CEO of Solium, he remains every bit as passionate about creating and optimizing technology to solve business challenges. Marcos was the winner of the Ernst & Young Entrepreneur of the Year award for the technology sector, Western Canada. Under his leadership, Shareworks has evolved to be a truly global platform used by more than 3000 companies spanning the globe.

Innovation and Technology: A Global Success Story

What started as a sketch on a napkin is now a world-class software platform that simplifies the complexities of equity plan management.

In a competitive world where innovation and technology move organizations to the global stage, Solium is a success story, in our own backyard. The Calgary-based software firm is a great example for other companies thinking about setting up shop here in Alberta.

Can Alberta be the next tech hub? Marcos will share the share the Solium journey, how creativity and innovation evolved, and the future of global technology.

KEYNOTE SPEAKERS

Bee Calliou Schadeck

Truth, Reconciliation and YOU!



With warmth, humour and a wealth of experience, Bee Schadeck brings the history of Canada and Aboriginal people to life. Learning becomes effortless with storytelling, presenting facts and sharing images from Canada's rich and stirring history.

Respectful working relationships are essential both in personal life as well as in business. Bee has a natural talent for bringing people together from all walks of life, and creating a space where the human experience can be shared.

Bee Calliou Schadeck is a member of the Michel First Nation, Treaty #6, Alberta. She spent her childhood on a farm and also raised her three children in rural Alberta. Bee's career began as a laboratory technician and after a project was stalled by First Nation communities, Bee was launched into unfamiliar territory. Bee began a discovery of our country's history and over time became one of the most sought after Aboriginal awareness educators in Alberta. She now draws on over 35 years of experience to enrich her awareness sessions. Bee is currently the Senior Aboriginal Advisor with Devon Canada.

"Having witnessed the profound changes in attitudes from both Aboriginal and non-Aboriginal people, I realized that learning more about Aboriginal history creates a bridge to understanding and compassion. I feel blessed to be able to share my knowledge to help create peace in this world.

Truth, Reconciliation and YOU!

Bee Calliou Schadeck will be sharing her perspective on Truth, Reconciliation & YOU. She will describe four critical times in our history to explain why things are the way they are today in many Indigenous communities. Bee will share a powerful residential school story and the inter-generational effects it has today. This truth is essential to create the consciousness for reconciliation. Bee will leave you with some examples of what you can do to be part of reconciliation's Call to Action.

KEYNOTE SPEAKERS

Michael Kerr

Inspiring Workplaces: The Way Work OUGHT to be!



Why choose between humour and content when you can have both? Mike Kerr is one of North America's leading authorities on fostering innovative and inspiring workplace cultures. His presentations—known for introducing practical ideas that audiences can put to work immediately—are delivered in a truly unforgettable and hilarious fashion for maximum impact.

A “Hall of Fame” and award-winning international business speaker, trainer, and bestselling author, Mike has delivered his captivating keynote presentations and workshops to thousands of audiences around the world, from the US to Iran to Austria. His programs offer relevant, practical ideas, as delivered with his memorable brand of clean, high-energy humour.

A former government manager and business owner for over twenty years, Mike is the author of *Inspiring Workplaces: Creating the kind of Workplace Where Everyone WANTS to Work*, and *Putting Humor to Work*. His company, Humour at Work, offers books, training DVDs, audio CDs, and numerous support resources to help any organization build a more successful workplace culture.

Inspiring Workplaces: The Way Work OUGHT To Be!

Why choose between content and fun when you can have both? Inspiring Workplaces offers practical, relevant ideas geared towards creating more inspiring, innovative, fun and successful workplaces, delivered in a humorous and memorable style.

You will laugh as you learn:

- » Choosing your workplace attitude before it chooses you
- » Why inspiring workplaces value their values and what it means to truly honour your workplace values
- » Dreaming of a better future: Why a compelling vision matters
- » Why (and how) inspiring workplaces put humour to work for great success
- » Creating an inspiring customer service mindset towards customer and employees
- » Inspiring creativity and innovation at work to manage change and prepare for the future
- » Inspiring communication in the workplace: The difference between efficient communication and truly effective communication
- » Inspiring employees: the top five motivating influences in any workplace
- » Thanks a lot! Creating a culture of celebrating, recognizing and rewarding
- » Guiding lights for creating more inspiring workplaces

KEYNOTE SPEAKERS

Jaqui Parchment

Mending The Gap! Bold Insights from The World Economic Forum



Jaqui is a Senior Partner and Toronto Office Leader for Mercer Canada. She leads more than 500 employees who support clients across Mercer Canada's Health, Wealth and Careers businesses in Toronto. She is charged with ensuring that the Toronto team provides industry-leading service and also acts as a Senior Consultant within Mercer Canada's wealth business.

Up until December, 2016, Jaqui led the Investments business in Canada. Jaqui has more than 25 years of experience in the retirement savings and investment areas and is on the faculty of the School of Pension Investment Management. Jaqui re-joined Mercer in 2013, after two years as Executive Director of Sales for a large global money manager. Prior to 2013, she held a variety of roles at Mercer, including National Director of Consulting and Head of Toronto, Mercer Investments (Advice Segment).

Jaqui actively supports several non-profit organizations devoted to assisting youth and new immigrants to Canada. She is also the Canadian leader of Women@Mercer, committed to progressing Mercer's diverse and inclusive culture. She is a frequent speaker on issues relating to Women in Finance as well as Women in the Workplace and sits on a number of investment committees relating to pension and endowment assets.

Jacqui graduated from the University of Waterloo with a Bachelor's Degree in Mathematics and Actuarial Science. She is an Associate of the Society of Actuaries and a CFA Charterholder.

Mending the Gap! Bold Insights from The World Economic Forum

The stress of financial security is impacting all countries, organizations and people and is the next global crisis. Ensuring Financial Security for all requires structural changes to mend the existing savings gap, health gap and tools gap:

- » Millennials are the largest segment of the workforce and will change jobs more frequently than any other
- » Women face a gender gap in salary inequity, career continuity and access to employer-sponsored plans—and are significantly more stressed than men.
- » The "gig" economy and informal workforce face gaps in access and affordability of retirement and benefit plans.

Join Jaqui to explore the biggest advancements impacting how people live, work and save—including structural and technological changes needed to address the financial security gap of the at-risk segments above.

Jaqui will provide an in-depth look at the newest research project led by Mercer with contributions from the World Economic Forum, Stanford Longevity Centre and the Milken Institute. Presented at the 2018 WEF, The Health, Wealthy and Workwise research identifies the critical imperatives for financial security in the areas of health, action, technology and structures.

KEYNOTE SPEAKERS

Margaret Trudeau Changing My Mind



Margaret Trudeau is a Canadian icon, celebrated both for her role in the public eye and as a respected mental-health issues advocate. From becoming a prime minister's wife at a young age, to the loss of both her son and her former husband, to living with bi-polar disorder, Margaret tirelessly shares her personal stories to remind others of the importance of nurturing the body, mind and spirit.

Margaret is the author of four books, including her bestselling title, *Changing My Mind*, which charts her life's ups and downs, and her latest title, *The Time of Your Life*, which offers women an inspirational and practical approach to creating a healthy, happy, secure and satisfying future.

Margaret sits on the Executive Advisory Board of the UBC Mental Health Institute as a community advocate, and she is the former Honourary President of WaterAid, a charitable Canadian non-governmental agency that is dedicated to helping poor communities in developing countries build sustainable water-supply and sanitation services. She is also the proud mother to Prime Minister Justin Trudeau.

Changing My Mind

Canadians fell in love with Pierre Elliott Trudeau's beautiful bride when he brought her to the world stage as the youngest First Lady in the history of the country. Yet, as time went by, Margaret was unprepared for public life, and plagued by mood swings. After three sons with Pierre, the marriage ended. She then remarried and had two more children. But the tragic loss of her son, Michel, in a skiing accident and the passing of Pierre Trudeau a few years later, were too much to bear, and she became severely ill.

Today, Margaret has rebuilt her life once again. Now, she brings her formidable life story to the stage in her quest to help others, sharing her message of resilience with the goal of helping to inspire others and to erase the stigma surrounding mental health issues.

All delegates will receive a copy of Margaret Trudeau's book, *Changing my Mind*, compliments of CPBI.

CONCURRENT SESSIONS

Wednesday, April 11 // 3:30–4:45PM

SESSION #1: PEOPLE

Putting the “i” in TEiAM

Room: Hawthorn A



Brenda Jacobson



Ed Kang

SPEAKERS: Brenda Jacobson and Ed Kang, YouEQ

Dynamic teams require powerful Individuals with a clear Identity and an understanding of their Intrinsic Nature to Inspire them to Invest their best selves with Integrity in all they do. There are a lot of ‘i’s’ in a powerful team.

Experience the potential of game dynamics to inspire individuals and weave them into dynamic teams. The YouEQ Productivity Platform integrates a series of games—both in person and on-line to create an environment where employees motivate themselves, expand their emotional intelligence and develop conversation skills that get results in all realms of life.

Hear about the experiences and documented results from real world case studies.

Join Brenda Jacobson, Synthesizer and visionary for YouEQ, and Ed Kang, Chief Game Changer, for a game changing experience.

CONCURRENT SESSIONS

Wednesday, April 11 // 3:30–4:45PM

SESSION #2: TECHNOLOGY

Financial Wellness at Work: Transitioning Employees to a Self-Service Environment

Room: Hawthorn B



Bruce Fletcher



Karen Hall

SPEAKERS: Bruce Fletcher, ATCO Group and Karen Hall, T.E. Wealth

Employers across Canada recognize the benefits of offering programs aimed at bolstering employee financial well-being. It starts with examining the process. This means identifying which programs, tools and resources are the best fit for the corporate culture, in order to meet the needs of employees and achieve the intended objectives.

Cultivating a self-service environment that encourages employees to make self-informed decisions led the ATCO Group to select T. E. Wealth's ProsperiGuide, a web-based personal finance learning platform, as their preferred solution. What followed was transformative. A communications plan that would embed ProsperiGuide into the very fabric of the company. Bruce Fletcher, ATCO's Director of Pension & Benefits, and Karen Hall, T.E. Wealth's Vice President of Financial Education and Employer Services will walk you through what worked and how the plan evolved just one year after its launch.

CONCURRENT SESSIONS

Wednesday, April 11 // 3:30–4:45PM

SESSION #3: COMPLIANCE

How to Give Your Fund Line Up the TLC it Deserves

Room: Hawthorn C



Colleen WarreLOW



Rob Mitchell

SPEAKERS: Colleen WarreLOW, Tundra Energy Marketing Limited and Rob Mitchell, Gallagher Benefit Services

When designing or reviewing a fund lineup it is as important the offering aligns with an organization's demographical and philosophical identity as any other element of their benefit offering.

During this presentation Rob Mitchell, the leader of Gallagher's Group Retirement team, will explore the considerations and options that should be reviewed when designing a fund lineup, including demographic makeup, religious influence and more.

You will then hear a real life example from Colleen WarreLOW, Vice President, Human Resources at Tundra Energy Marketing Limited, to demonstrate the value and how best to, and not to, develop and review your lineups, providing you with the tools and knowledge to critically assess your offering.

CONCURRENT SESSIONS

Thursday, April 12 // 10:00–11:10AM

SESSION #4: PEOPLE

Paying for Value: Focus on High Quality Pharmacy Care

Room: Hawthorn A



Leila Mandlsohn

SPEAKER: Leila Mandlsohn, Greenshield Canada

Leila Mandlsohn, Pharmacy Strategy Consultant with Greenshield Canada, will focus on the emerging movement towards measurement of quality and outcomes in health care as a basis for health provider reimbursement. Particular focus is paid on international and national jurisdictions such as the Quality and Outcomes Framework (QOF) in the UK, the Centres for Medicare and Medicaid Services (CMS) Five-Star Quality Rating System in the US and the Excellent Care for All Act in Ontario. The presentation will also examine GSC's recent efforts to reform the reimbursement landscape to tie patient outcomes more closely to provider (and in particular pharmacy) reimbursement and more broadly the efforts to ensure plan sponsor investments in benefits plans are yielding optimal health outcomes.

SESSION #5: TECHNOLOGY

Driving Culture into the New Era

Room: Hawthorn B



Scott Watson

SPEAKERS: Chantal Primeau, Achievers and Scott Watson, Alberta Energy Regulator

With the creation of the Alberta Energy Regulator (AER) also came the opportunity to create a new cultural identity. In this presentation Scott Watson, Manager of Pension, Benefits and Payroll at AER, along with Chantal Primeau, Customer Success Manager with Achievers, will discuss how AER group focused their efforts on redefining their organization culture through an innovative recognition program titled, 'Special Thanks and Recognition Program' or more commonly known as the STAR Program. This program implementation case study will walk through the change management challenges that the AER faced and how the program was configured to align with strategic business goals. They will provide an interface overview and demonstrate how the program redefined the organization and became the catalyst for increasing employee productivity through measurable results.



Chantal Primeau

CONCURRENT SESSIONS

Thursday, April 12 // 10:00–11:10AM

SESSION #6: TECHNOLOGY

Decumulation: It's All Downhill From Here

Room: Hawthorn C



Cheryl Shea



Debbie Wilson

SPEAKERS: Cheryl Shea, NOVA Chemicals and Debbie Wilson, University of British Columbia

For several years now, a shift has been occurring from defined benefit to defined contribution pension plans as the most common retirement program offered by Canadian employers. Going forward, more and more employees retiring from defined contribution plans will be faced with making some very challenging decisions for how to convert their accumulated savings into retirement income. Currently there is a lack of suitable decumulation options available to these retiring employees and this has caused concern for employers and industry associations.

The Pension Investment Association of Canada (PIAC) has been the national voice for Canadian private and public pension funds since 1977 in matters related to pension investment and governance. Senior investment professionals employed by PIAC's member funds are responsible for the oversight and management of over \$1.8 trillion in assets on behalf of millions of Canadians. PIAC's mission is to promote sound investment practices and good governance for the benefit of pension plan sponsors and beneficiaries.

In 2012 PIAC established a working group to study issues related to defined contribution pension plan investment. The now 8 member Defined Contribution (DC) Committee supports PIAC's membership by sharing research, monitoring the regulatory environment and collaborating on PIAC's advocacy efforts. One of this group's most recent submissions to the Minister of Finance was specifically focused on the defined contribution decumulation issue and some of the regulatory hurdles that exist.

At this session you can hear more from Cheryl Shea, Leader, Pension Investment at NOVA Chemicals and Debbie Wilson, Director, Pensions for the UBC Staff and Faculty Pension Plans about the PIAC DC Committee's thoughts on this issue and what one of PIAC's member funds is doing to help their members with defined contribution decumulation.

CONCURRENT SESSIONS

Thursday, April 12 // 1:45–3:00PM

SESSION #7: PEOPLE

Putting Creativity and Innovation to Work

Room: Hawthorn A



Michael Kerr

SPEAKERS: Michael Kerr, International Business Speaker, Trainer and Best Selling Author

Do you want to get more ideas from your employees? And better ideas? Do you want to eliminate “but-headed thinking” (“But, we can’t do that!”)? Putting Creativity to Work offers simple, practical ideas on how to foster a more creative workplace, delivered in a fun, memorable style.

Michael Kerr will teach you:

- » Why creativity is one of the most valuable workplace commodities
- » The creative process simplified
- » Creating a culture of questioning, a culture of curiosity
- » Storming the brains: how to inspire more creativity
- » The humour connection: Why HA + Ha = AHA!
- » Simple ways to get generate more ideas
- » Eliminating idea-squashing language and behaviour
- » Turning failure on its heads
- » What blocks ideas, what helps ideas
- » Advancing and selling your ideas: turning your best ideas into winning results.

CONCURRENT SESSIONS

Thursday, April 12 // 1:45–3:00PM

SESSION #8: TECHNOLOGY

Beyond Traditional Asset Classes, Panel Discussion

Room: Hawthorn B



Julianna Spiropoulos



Kathrin Forrest



Jeff Berman



Greg Wilkinson

SPEAKERS: Julianna Spiropoulos, Kathrin Forrest, Jeff Berman and Greg Wilkinson

This informative session will be led by an overview from Julianna Spiropoulos, Associate Partner at Aon, on the consulting approach to assisting plan sponsors in incorporating non-traditional asset classes. The session will include considerations around risk management, evaluation and implementation.

A deeper dive into some of these non-traditional asset classes will be offered by Katherine Forrest, Portfolio Manager at Sun Life Global Investments, Greg Wilkinson, Institutional Portfolio Manager at Franklin Templeton, and Jeff Berman, Managing Director at BlackRock.

Join us in this fast-paced session to learn more about private debt, commercial mortgages, real estate, private equity, timber and agriculture.

CONCURRENT SESSIONS

Thursday, April 12 // 1:45–3:00PM

SESSION #9: COMPLIANCE

The Sustainable Path Forward

Room: Hawthorn C



Kelli Littlechilds



Jocelyn Plakas-Lock



Yatin Patel

SPEAKERS: Yatin Patel, Jocelyn Plakas-Lock, Kelli Littlechilds, Alberta School Employee Benefits Plan

In this engaging session presented by Alberta School Employee Benefit Plan (ASEBP), Yatin Patel, Program Manager, Pharmacy Services, Kelli Littlechilds, CEO and Jocelyn Plakas-Lock, Director, Health and Benefit Services, you will learn how ASEBP leveraged the support of the pharmacy community to manage drug costs in a way that effectively balanced member health outcomes with efficient plan management. Participants will hear how ASEBP's approach to formulary management, plan design and pharmaceutical case management, along with a unique communication strategy, helped them to navigate the challenges of managing both high cost and maintenance medications in a manner that does not compromise member health.

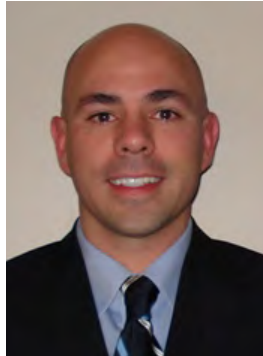
CONCURRENT SESSIONS

Thursday, April 12 // 3:20–4:30PM

SESSION #10: PEOPLE

The Future's Illuminated Solution: Pharmacogenetics

Room: Hawthorn A



Dr. Tyler Amell

SPEAKERS: Dr. Tyler Amell, Morneau Shepell

Session participants will learn about pharmacogenomics and the use of personalized medicine to improve mental health treatment, recovery, stay at work and return to work. Dr. Tyler Amell, Partner at Morneau Shepell, will cover the topic of health and productivity as it relates to absenteeism, presenteeism as well as disability management and prevention during this informative session.

Participants will leave with a clear understanding of the direction personalized medicine is taking and the measurable impact on individuals recovering from various mental health conditions, such as anxiety and depression.

SESSION #11: TECHNOLOGY

Artificial Intelligence

Room: Hawthorn B



Pierre Bouchard

SPEAKER: Pierre Bouchard, Cidel Asset Management

The quest to give machines human-like intelligence has been going on for decades but the emergence of deep learning, which enables computers to learn on their own, has proven to be a major breakthrough. While it will be some time before we are able to have deep and meaningful conversations with our computers, its pursuit will affect our economy for years to come. In this presentation, Pierre Bouchard, Portfolio Manager with Cidel Asset Management, will discuss how investors can incorporate the risks and potential rewards associated with Artificial Intelligence in their investments.

CONCURRENT SESSIONS

Thursday, April 12 // 3:20–4:30PM

SESSION #12: COMPLIANCE

Beyond Traditional Asset Classes: An Employer Experience

Room: Hawthorn C



Andrew Coward



Marcus Turner

SPEAKERS: Andrew Coward, University of Victoria
and Marcus Turner, Willis Towers Watson

As plans explore opportunities to diversify their investment risks they are increasingly turning their attention to non-traditional asset classes such as real assets, private equity and hedge funds. Although segments of these alternative asset classes, such as real estate, have become mainstream the complexity associated with implementation and oversight can be significant. In this session we will explore the practical considerations of introducing non-traditional asset classes into portfolios.

Marcus Turner, Director and Senior Investment Consultant with Willis Towers Watson, will provide context on typical challenges plan sponsors face with introducing alternatives including developing a breadth of understanding of these asset classes and the disproportionate amount of time committees often need to invest when overseeing these allocations.

Andrew Coward, Treasurer of University of Victoria, will speak to his experience diversifying the Fund's portfolio with alternative investments. In particular, Andrew will comment on the challenges of evaluating and assessing alternative investments opportunities and getting buy-in across a diverse group of stakeholders with varying degrees of investment sophistication. He will also speak to the ongoing aspects of monitoring, benchmarking and managing these investments within the context of UVic's available resources.

CONCURRENT SESSIONS

Friday, April 13 // 10:00–11:10AM

SESSION #13: PEOPLE

The Legalization and Regulation of Cannabis

Room: Hawthorn A



Debra Deane



Alison McMahon

SPEAKERS: Debra Deane, Zedi and Alison McMahon, Founder, Cannabis at Work

Medical Cannabis and the impending legalization of recreational cannabis in Canada can have great implications on our workplaces. Employers need to ensure they are educated on how to manage both medical and recreational use by employees.

During this session, Debra Deane, Vice President, People at Zedi Inc., will explore how her organization has mitigated the risk with their employees in Colorado, and the impact of impending legislation on their Canadian workforce.

You will also gain knowledge from Alison McMahon, Founder & CEO of Cannabis at Work, on the nuances of medical marijuana and how employers can address their own drug and alcohol policies, while balancing workplace safety.

CONCURRENT SESSIONS

Friday, April 13 // 10:00–11:10AM

SESSION #14: TECHNOLOGY

A First of its Kind Annuity Transaction – Husky’s Case Study

Room: Hawthorn B



Steve Sproule



Marco Dickner



Mathieu Tessier

SPEAKERS: Steve Sproule, Husky Energy; Marco Dickner, Willis Towers Watson; Mathieu Tessier, Sun Life Financial

In this session, Steve Sproule, Team Lead Health, Benefits & Retirement at Husky Energy, Marco Dickner, leader of Willis Towers Watson’s Canadian Retirement Risk Management team and Mathieu Tessier, Director, Client Relationships at Sun Life Financial, will discuss the innovative approach selected by Husky Energy to settle its pension liability well in advance of an upcoming plan termination. The transaction involved the purchase of annuities for not only inactive members, but also active members covering both past and future benefits accrual (to our knowledge, a first of its kind in Canada).

The speakers will discuss the case study from all three points of view: the plan sponsor, the advisor and the insurer.

What were other options considered? What were the challenges and the advantages? What was the decision-making process in selecting the approach?

CONCURRENT SESSIONS

Friday, April 13 // 10:00–11:10AM

SESSION #15: COMPLIANCE

Disability Cost Management Trends and Legal Considerations

Room: Hawthorn C



Melanie Jeannotte



Michael D. Aasen



Rhonda Ozcan

SPEAKERS: Michael D. Aasen, McLennan Ross, Rhonda Ozcan, Great-West Life and Melanie Jeannotte, Gallagher Benefit Services

Disability programs continue to be under a great deal of pressure with the aging workforce, rise in mental health claims, increasing work pressure and sector specific risks. With the significant increase in claim incidence and duration over the past 10 years, what does the future of these programs look like?

Join industry experts Melanie Jeannotte, Area President for Gallagher Benefit Services (Canada) Group, Inc., Michael D. Aasen, McLennan Ross and Rhonda Ozcan, Organizational Health Consultant, Great-West Life in examining:

- » The disability landscape and trends in Canada
- » Mental health claim complexities and opportunities
- » Canadian disability survey and working group outcomes
- » Best practice disability design, policy and process.

GALA DINNER AND ENTERTAINMENT

5 ON THE SIDE

Thursday April, 12 // 6:00–10:00PM Room: Wildrose Salon A/B



Edmonton's Favorite Party Band will set the stage for a high energy evening with a variety of music at our Gala dinner.

Made up of five musicians, this Edmonton party band not only grooves together during gigs but in life. Most of the members have been friends for over ten years and have traveled and performed in various places around the world. This is what sets them apart from any other band; they truly love what they do and who they do it with! Five on the Side has been recognized for their exceptional talent by being chosen as a finalist in the "Live Entertainment – Bands" category of the 2018 Edmonton Event Awards, which celebrates outstanding event professionals.

CONFERENCE INFORMATION

Registration

We invite you to spend 48 hours rubbing shoulders with the most passionate and knowledgeable experts in the pension, benefits and investment industry. Prepare to be filled with insights, tactics and inspiration to advance your expertise and add value to your organization.

Early Bird registration has now ended, but it's not too late to register for the premier pension and benefits conference of the year. Registration has been brisk and there are 150+ employers, insurance carriers, benefits professionals and industry partners attendees.

CONFERENCE FEES INCLUDE

Conference fees include all meals and presentation materials as well as a copy of Margaret Trudeau's book, *Changing My Mind*. To be considered a member of CPBI you must have your annual membership dues paid for the current year. Privileges granted to a member are not transferable to another person. Conference fees do not include taxes or hotel accommodations.

FULL DELEGATE PASS

	Regular Registration
Member	\$1249
Non-member	\$1749

Full refund will be provided only upon notice of cancellation being received **no later than 14 business days prior to the event**. If sufficient prior notice of cancellation is not received or you do not attend the session, charges still apply.

Hotel Information

The host hotel is The Rimrock Resort Hotel located at 300 Mountain Avenue in Banff, Alberta. All conference functions will be held in The Rimrock Resort Hotel Convention Facility.

A limited number of rooms for conference delegates have been reserved at The Rimrock Resort Hotel. Please note the quoted price does not include taxes, parking or other room charges. Accommodations must be booked separately from your conference registration. Please reserve your room by calling 1-888-746-7625 and using the **promotion code is 180411CPBI**. Convenient self-service parking is available at a discounted rate for \$16/night. Valet parking is \$30/night.

Registered guests receive a 10% discount on treatments at the Rimrock Spa. We recommend you phone ahead for a reservation as appointments fill up quickly. To book an appointment, call 1-403-762-1835. The Rimrock Fitness Facility is complimentary to registered guests.

Rimrock Resort Hotel Conference Facility provides complimentary wireless internet throughout the hotel and conference facility, including any pre and post stays. A 24 hour business centre is located in The Rimrock Resort Hotel.

ROOMS AND RATES

Rooms	Price
Standard Room rimrockresort.com/room_standard.html	\$174
Premium Room rimrockresort.com/room_premium.html	\$224

Book your room using code: 180411CPBI

Travel Information

AIR CANADA

The booking is to be made to Calgary, YYC (AB) The travel period begins Wednesday, April 04, 2018 and ends Friday, April 20, 2018. Travel is valid every day of the travel period.

Book online at www.aircanada.com using promo code 89T7RMW1

WESTJET

Westjet offers 10% off Econo and 15% off Plus base fares* for travel between Calgary and anywhere WestJet flies in North America.

Book online at www.westjet.com using promo code 4RS07W8

GROUND TRANSPORTATION

Banff is not serviced by regular air transportation; conference delegates may travel to Banff via bus or rental car.

Shuttle buses depart the Calgary International Airport daily with a stop at major hotels in the Banff area, including The Rimrock Resort Hotel. Delegates receive a 15% discount on the Banff Airporter for shuttle service from the Calgary Airport to The Rimrock Resort Hotel. Reserve online at www.banffairporter.com/book (enter the promotional code cpbiwest on the final payment page). To reserve by phone, call (888) 449-2901 and mention you are attending the CPBI West conference. Travel time between the Calgary Airport and Banff is normally two hours, depending on weather and traffic.

Avis Car Rental is offering delegates discounted rates, which are available at the Calgary Airport and Banff. For rental rates and reservations, call 1-800-331-1600 and quote code **Q100040** or book online using the link, which will automatically add the **discount code Q100040**

If you are driving a vehicle to Banff, you will need to purchase a National Park pass (about \$10 per day) at the park gate.