

The Canadian Pension & Benefits Institute

2014 Ontario Regional Conference

October 1-3, 2014

Identify the Challenges

BENEFITS

Examine the Issues

RETIREMENT

Find the Solutions

ANSWER



The 2014 CPBI Ontario Regional Conference brings together industry leaders who will examine and analyze today's issues surrounding employee benefits, pensions and institutional investment. This conference is designed for all industry professionals – consultants, service providers and plan sponsors. By attending this conference you will get answers to some of today's most pressing and complex issues. Choose your participation from a selection of workshops and plenaries designed especially for those working in the benefits, pensions, investment and human resource fields. Achieve the best education to make you more effective in your job!

To be held at the newly renovated
Crowne Plaza Hotel in Kitchener!

October 1-3, 2014
Crowne Plaza Hotel
Kitchener, Ontario



Visit cpbi-icra.ca
or call 1-877-599-1414
for more information



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2014 Ontario Regional Conference
 Crowne Plaza Hotel, Kitchener, ON | October 1-3, 2014



Workshop Details

Thursday, October 2, 2014 10:35 am - 11:35 am Choose One

Benefits Workshop B1 – Oh What a Life on Drugs

This session will provide an overview of drug consumption and adherence data, an overview of recent drug plan design trends and what other solutions employers are implementing to manage drug spend and improve the health and wellness of their plan members. Are PBMs, carriers and employers focusing on the right areas? Are employees taking charge of their own health and how do you influence plan member behaviour? Francois-Joseph Poirier and David Willows will explore the possibilities.

Speakers: David Willows, Green Shield Canada
 Francois-Joseph Poirier, Mercer

Pension/Investment Workshop P1 - Mitigating the Risk of Low Member Engagement

This workshop will discuss the risks associated with low member engagement in DC plans and developments regarding DC plan default funds. Litigation and regulatory developments in the US and UK will be discussed in order to learn lessons to avoid similar issues here in Canada. The workshop will also discuss the risks associated with delayed retirements within a workforce and their effect on dynamics, productivity, benefit costs, and the public relations issues that can also be associated with a workforce that is not prepared for retirement.

Speakers: Oma Sharma, Mercer
 Kim Ozubko, Blake, Cassels & Graydon LLP

Thursday, October 2, 2014 3:00 pm - 4:00 pm Choose One

Benefits Workshop B2 – Evolution of Total Rewards

Companies spend millions on total rewards each year, but do employees understand and value what they have? Do they see the big picture, or just a bunch of programs? With total rewards, the whole is greater than the sum of the parts. Could you be getting more out of your investment?

If you're puzzled by total rewards, join Lisa Silcox to learn how to create a holistic rewards framework to attract the right people with the right skills, enhance the employee experience, and support the achievement of your corporate vision. Lisa will discuss: why a clearly defined and culturally reflective total rewards strategy is important; how it provides a foundation for the development and integration of rewards programs; and how to keep it real for employees day-to-day. It's only when you put all the pieces together that you can see the big picture.

Speaker: Lisa Silcox, Eckler Ltd.

Pension/Investment Workshop P2 - Rethinking DC Investment Lineups

This workshop will review how and whether DC plans can implement alternative asset classes in their platforms for member portfolios. The discussion will examine popular types of alternative investment asset classes, proper asset allocation amongst alternative classes, including target date glide paths. The session will also examine impediments to implementing alternative asset classes under DC plans and strategies for overcoming those impediments.

Speakers: TB

Friday, October 3, 2014 10:00 am - 11:00 am Choose One

Benefits Workshop B3 – Health Benefit Solutions for Retiring Employees

A brief look at what employers are doing with their pension plans for retiring employees, according to an Aon Hewitt survey. But what are employers doing around health benefits? Employees are reaching an age where their health coverage is of the utmost importance and most retiring employees have the perception that their benefits terminate at Age 65 (or 70). Employers are not communicating effectively enough to make retirees aware of their options... what are their options? This is what this workshop will help answer.

Speaker: Nabil Merali, Aon Hewitt



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Friday, October 3, 2014

10:00 am - 11:00 am (cont'd)

Choose One

Pension/Investment Workshop P3 - Managing Pension Costs Through Investment Strategies

This workshop will discuss the benefits of taking a holistic approach to managing pension costs through the investment of DB plans. The discussion will address the importance of investment journey paths, fixed income strategies and implementation of de-risking opportunities, including annuity buyout or buy-in strategies.

Speakers: Todd Nelson, Towers Watson
Eric Menzer, Manulife Financial

Moderator: Toms Lokmanis

Friday, October 3, 2014

11:15 am - 12:15 am

Choose One

Benefits Workshop B4 – Mobile and On-Line Technology: How is technology changing the payer landscape and what are the tradeoffs?

This session contrasts the advancement in mobile and desktop technologies against the perceived risk of enabling member fraud and abuse. What are claims adjudicators doing to remove any exposure of cost increases due simply to ease of member submission. How much flexibility and control are we giving the plan sponsor to determine their risk tolerance and willingness to embrace technology into their benefit program, and how does it improve the overall member experience. What are the future developments in mobile technology?

- Outline of the On-Line and Mobile Technology Features
- Benefits to the Member Experience
- Does the on-line process increase the risk for fraud and abuse?
- How to alleviate plan sponsors concerns
- Future development in on-line member submissions

Speaker: Paul Hardwick, ClaimSecure

Pension/Investment Workshop P4 - Retaining Top Talent With Robust Pension Arrangements

This workshop will discuss the importance of maintaining pension plans in order to retain top talent now and into the future. The workshop will discuss findings from Towers Watson's Retirement Attitudes survey that highlight how employees feel about their confidence in retirement, their attitudes toward risk and the way benefit programs factor into their employment decisions. In today's globally mobile workforce, the session will highlight how attitudes toward retirement programs and other benefits for Canadian employee compare to their counterparts in other key geographies in the competition for talent.

Speaker: Karen Burnett, Towers Watson



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Keynote, Plenary and Lunch Speaker Details

Thursday, October 2, 2014 **8:45 am - 10:15 am** **All Delegates Attend**

Keynote Speaker Marnie McBean
Start Happy Finish Happy



How do you keep the “fun” in a long career? As we progress through a career—the joy of achievement, learning and ‘winning’ starts to get nudged out by expectations. Marnie McBean looks back at the nine Olympic Games she’s been involved in, and the lessons and impact that they’ve left her with, perhaps one of the top being that, “you can’t finish happy if you don’t try to start happy.” In this talk, Marnie describes the four key elements to starting happy, using relevant and interesting examples to elucidate her points and give audience key and immediately implementable takeaways to start on the path to personal success.

Thursday, October 2, 2014 **11:45 am - 1:15 pm** **All Delegates Attend**

Lunch Speaker Lorraine Behnan
Ignite Your Evolution (Excelling Through Change)



It is no longer enough to merely survive change; it is necessary to grow and evolve. Despite the rapidity and discontinuity of rapid transitions you can take control of achieving professional excellence by practicing personal mastery: adjust attitudes and behaviors, exceed limits, choose wisely, act on opportunities, keep current on business practices and knowledge. Lorraine Behnan brings to her audiences over twenty years of professional speaking experience, and knowledge of communication and personal change management. Her passion for her subject matter is highly contagious.

Lorraine consistently demonstrates her ability to motivate people to evolve and excel in our fast-forward world, while sharing practical solutions that can be immediately put into practice. A former actor and writer with the internationally acclaimed, Second City Comedy Revue, Lorraine combines her theatre skills with her consulting experience to create keynote speeches and workshops that educate, entertain, and inspire – an engaging style that has been branded as, “edu-tainment”.

Thursday, October 2, 2014 **1:30 pm - 2:45 pm** **All Delegates Attend**

Plenary 1 *An Age-Old Concern - Risks and Considerations of Managing an Aging Workforce: A Plan Sponsor Perspective*
Moderator: Barbara Jaworski
Panel: TBA

This session will explore recent developments regarding the accommodation and management of an aging workforce:

- Modified duties
- Undue hardship
- Ongoing benefit coverage
- Postponed retirement

What does this mean for plan sponsors and what risks are associated with an aging workforce (human rights, financial, workplace health and safety). Recent legal developments and changes to industry practices will be explored.

Friday, October 3 2014 **8:30 am - 9:45 am** **All Delegates Attend**

Plenary 2 *Solutions for an Aging Workforce: Plan Sponsor Stories*
Moderator: Barbara Jaworski
Panel: TBA

Following on the discussion of legal risks and considerations, this session will discuss strategies that have been engaged by plan sponsors to manage their aging workforce.

What has worked? What has not?

And what can plan sponsors do to mitigate the risks associated with an aging workforce:

Reverse mentoring? Phased retirement? Bridging? Expanded pre-retirement planning to include psychological preparation? EAP?

Friday, October 3, 2014 **12:00 pm - 2:00 pm** **All Delegates Attend**

Lunch Speaker Jeffrey Simpson
Can Canada's Healthcare System Survive?



Jeffrey Simpson examines the tenets of the medicare system that Canadians cling to so passionately. He finds that many other countries have more extensive public health systems, and Canadian health care produces only average value for money. In fact our rigid system for some health-care needs and a costly system for other needs—drugs, dentistry, and home care—is really the worst of both worlds. In his recent book *Chronic Condition* he breaks the silence about the huge changes and real choices that Canadians face.



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Crowne Plaza, Kitchener
Located at King and Benton Streets

Conference Rates: Deluxe Rooms: \$134.00
 Executive Rooms: \$144.00

Delegates are responsible for reserving their own hotel accommodations. Be sure to reserve your room – after September 1st, the above room rates will be honoured but availability is not guaranteed.

To reserve your room:
 >>CLICK HERE<< and choose your room choice
 or call 519 744-4141 and indicate you are with the CPBI Conference.

Please complete the two page registration form and fax to: 1-905-643-2972 or scan/email to ontario@cpbi-icra.ca

Name: _____

Company: _____

Address: _____

City: _____ Postal Code: _____

Email: _____ Telephone: _____

Special Diet or Allergy: _____

Fees: (includes conference plenaries, workshops, all meals, Gala Evening and Receptions)

Member	\$700.00 + \$91.00 HST	\$ _____
Non-Member	\$950.00 + \$123.50 HST	\$ _____
Guest Invite a guest to attend meals, receptions and entertainment	\$300.00 + \$39.00 HST	\$ _____
Golf Tournament Includes 18 holes of golf, lunch and post-golf reception	\$80 + \$10.40 HST	\$ _____
TOTAL		\$ _____



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Wednesday, October 1st, 2014

7:00 pm – 10:00 pm Welcome Reception

Thursday, October 2nd, 2014

10:35 am – 11:35 am B1 - Oh What a Life on Drugs
 P1 – Mitigating the Risk of Low Member Engagement

3:00 pm – 4:00 pm B2 – Evolution of Total Rewards
 P2 – Rethinking DC Investment Lineups

Friday, October 3rd, 2014

10:00 am – 11:00 am B3 – Health Benefit Solutions for Retiring Employees
 P3 – Managing Pension Costs Through Investment Strategies

11:15 am – 12:15 am B4 – Mobile and On-Line Technology: How is technology changing the payer landscape and what are the tradeoffs?
 P4 – Retaining Top Talent with Robust Pension Arrangements

If paying by Credit Card please complete the Section Below. If you are paying by Cheque, please make it payable to CPBI Ontario:

Mail: 200 Bay Street
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TOTAL (from previous page): \$ _____

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Refund Policy: Written cancellation will be accepted with full refund until end of the day September 8th, 2014. Substitutions for attendance will be accepted up to the Conference day.