



## FORUM 2014 Agenda

### Monday May 26 2014

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| 11:00 - 6:00 | Registration  |
| 2:00 - 3:30  | <a href="#">Freedom Trail Tour</a> (Optional activity)  |
| 3:00 - 4:20  | <a href="#">Duck Boat Tour</a> (Optional activity)      |
| 7:00 - 9:00  | <a href="#">Welcome Reception</a> at the Top of the Hub |

### Tuesday May 27, 2014

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| 7:00 - 6:00 | Registration   |
| 7:00 - 5:00 | Exhibition   |
| 7:00 - 7:45 | Breakfast  |
| 7:45 - 8:45 | <a href="#">Welcome &amp; Opening Keynote</a><br><b>What's Happening with Our Workforce: Making Generations Work!</b><br>Jim Carroll, Futurist, Trends, Creativity & Innovation Expert |



### **Have your book signed by the author !**

All delegates will be given a complimentary copy of Jim Carroll's *The Future Belongs To Those Who Are Fast*.

A book signing session will take place after the keynote session.

9:00 - 10:45

#### **Is There a Looming Pension Crisis in Canada?**

Hon. Wes Sheridan, PEI Provincial Treasurer, Minister of Finance, Energy and Municipal Affairs;

Jim Leech, President and CEO, Ontario Teachers' Pension Plan;

Malcolm Hamilton, Senior Fellow; C.D. Howe Institute;

René Beaudry, Co-founder, Normandin Beaudry;

Moderator: Don Bisch, Director, Corporate Communications, Equitable Life of Canada

10:45 - 11:15

Health Break and Exhibition

11:15 - 12:15

Simultaneous Sessions (4)

Session 1

#### **Is Social Security In Worse Shape than Detroit's Pension System?**

Laurence J. Kotlikoff, Professor, Boston University, Research Associate, National Bureau of Economics Research; President, Economic Security Planning Inc.

Session 2

#### **Understanding and Applying the Health “Reformation”**

Carlos Balarezo, Chief Executive Officer, Genescient;

Robert Paterson, President, Renewal Consulting Group Inc, former Senior Advisor to the President, Canadian Institute for Advanced Research.

Session 3

#### **Global Fixed Income - Global Opportunities in a Rising Rate Environment**

Elsa Goldberg, Vice President, Senior Product Manager, Franklin Templeton, San Mateo, California

Session 4	<p><b>Les médias sociaux : une stratégie et non un canal</b>  Sophie Bellemare, Associate Vice-President, Digital Strategy, Standard Life  Karrina Dusablon, National Director, Education and Training , Desjardins Financial Security</p>
12:30 - 2:00	<p>Lunch &amp; Speaker  <b>BOOMERS: The Future of Financial Services and Retirement</b>  Brent Green, Author of « Marketing to Leading-Edge Baby Boomers: Perceptions, Principles, Practices, Predictions » and « Generation Reinvention: How Boomers Today Are Changing Business, Marketing, Aging and the Future »</p>
2:15 - 3:15	<p>Simultaneous Sessions (4)</p>
Session 5	<p><b>The D'Amours Report and its Intriguing Longevity Pension</b>  René Beaudry, Co-founder, Normandin Beaudry</p>
Session 6	<p><b>Oh What a Life...On Drugs</b>  David Willows, Vice-President, Strategic Market Solutions, Greenshield</p>
Session 7	<p><b>The Alternative Solution</b>  Peter Muldowney, Senior Vice President, Institutional Strategy, Connor, Clark &amp; Lunn Financial Group;  Colin Spinney, Treasurer, Dalhousie University</p>
Session 8	<p><b>Titres à revenu fixe mondiaux – Des occasions à l'échelle mondiale dans un contexte de hausse des taux d'intérêt</b>  Elsa Goldberg, Vice President, Senior Product Manager, Franklin Templeton, San Mateo, California</p>
3:15 - 3:45	<p>Health Break and Exhibition</p>
3:45 - 4:45	<p>Simultaneous Sessions (3)</p>
Session 9	<p><b>A New Approach in Underwriting High-Cost Drugs</b>  Jonathan Bohm, Consultant, Benefits, Normandin Beaudry;  Nicolas-Pierre Bergeron, Partner, Group Benefits, Normandin Beaudry</p>

Session 10 **Government and Healthcare: Preparing Plan Sponsors to Weather the Storm**  
Tim Clarke, Chief Innovation Officer, Health & Benefits, Aon Hewitt

Session 11 **Surmounting Political Barriers to Infrastructure Investment in Canada**  
John-Christian Bourque, Senior Consultant, StrategyCorp Inc.

6:00 - 7:00 [Cocktail Reception](#)

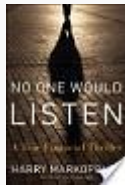
7:00 - 9:30 [Gala Dinner](#)

### Wednesday May 28, 2014

7:00 - 13:00 Registration

7:15 - 8:00 Breakfast

8:00 - 9:00 [Keynote](#)  
**Chasing Bernie Madoff**  
Harry Markopolos, Madoff Whistleblower



**Have your book signed by the author !**

Purchase a discounted copy of Harry Markopolos' book No One Would Listen when you register for the CPBI FORUM 2014.

A book signing session will take place after the keynote session. A copy of the book will be given only to those delegates who have purchased their copy when registering for FORUM 2014.

9:15 - 10:15 **Is It Time to Rethink the Role of Benefit Plans?**  
Brian Lindenberg, Senior Partner, Mercer;  
Sarah Beech, President, Pal Benefits;  
Marilee Mark, Vice-President, Market Development, Group Benefits, Sun

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Life Financial

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10:15 - 10:45 Health Break and Exhibition

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10:45 - 11:45 Simultaneous Sessions (4)

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Session 12 **A New Workplace Pension Scheme in the UK**  
Will Sandbrook, Director of Strategy, Research and Analysis, UK,  
National Employment Savings Trust (NEST);  
Robert Brown, President, International Actuarial Association, former  
President, Canadian Institute of Actuaries

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Session 13 **Social Media: A Strategy, Not a Channel**  
Sophie Bellemare, Associate Vice-President, Digital Strategy, Standard  
Life  
Karrina Dusablon, National Director, Education and Training, Desjardins  
Financial Security

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Session 14 **Understanding the Connections: Health, Financial Well-Being and  
the Workplace**  
Matt Miles, Vice-President, Product & Marketing, Group Benefits &  
Retirement Solutions, Manulife Financial

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Session 15 **A Tonic for Interest Rate Headaches?**  
Steve Morris, Managing Director and Portfolio Manager, Liability Driven  
Investments, Sun Life Financial

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12:00 - 1:00 Closing Remarks & Speaker  
**Lessons for Private Sector Retirement Security from Australia,  
Canada and the Netherlands**  
John A. Turner, Director, Pension Policy Center (US)

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1:00 Lunch