

Canadian Public Sector Pensions and Benefits Conference

August 19-20, 2009

WEDNESDAY, AUGUST 19, 2009

7:30 a.m.-4:30 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Long-Term Economic Outlook for Canada— A Strategic Economic Perspective

- Canada from the outside: strengths and weaknesses
- Some common misconceptions
- Prospects for Canada in light of the 2008 market madness

Moderator: Philip R. Evans

Speaker: To Be Determined

9:30-9:45 a.m.

Refreshment/Break

9:45-10:45 a.m.

Credit Crunch and Impact on Asset Mix for Institutional Investors

- How the credit crunch affects asset mix strategies
- What asset classes are appropriate under these conditions?
- How do you determine the right mix going forward?

Speaker: George M. Klar, CFA

President
Alternativ Solution, Inc.
Thornhill, Ontario

10:45-11:00 a.m.

Refreshment/Break

11:00 a.m.-12:00 noon

Real Estate—Opportunity or Not?

- The current state of the Canadian commercial real estate market
- What is the role of real estate in a pension plan?
- How can pension plans invest in real estate?

Speaker: Ted R. Welter

Managing Director, Real Estate and Mortgages
Greystone Managed Investments, Inc.
Regina, Saskatchewan

WEDNESDAY, AUGUST 19, 2009 (cont.)

12:00 noon-1:15 p.m.

Luncheon

1:15-2:15 p.m.

CAPSA and Pension Reform

- Summary of recommendations from expert panel reports
- Prospects for national harmonization of pensions/legislation
- Where do we go from here?

Speaker: Murray Gold

Partner
Koskie Minsky LLP
Toronto, Ontario

2:15-2:30 p.m.

Refreshment/Break

2:30-3:30 p.m.

Walking the Line—Public Employers and Their Private Drug Plans

- Public drug plan policy is affecting private drug plan sponsors, increasing risk and cost.
- The drug market is now focusing on new deals, not new products.
- Those who manage private drug plans for public employers are caught in the middle.
- Significant economic, demographic, human resource and member health issues remain key challenges.
- Learn about the recent legislative changes affecting drug plans, product and market trends, and plan management issues.
- Come prepared to discuss your challenges and to develop your responses for managing in this new market.

Speaker: Chris Bonnett, M.H.Sc.

President
H3 Consulting
Toronto, Ontario

3:30-3:45 p.m.

Refreshment/Break

3:45-4:45 p.m.

Market Crisis and the Weak Economy— Effect on Usage of Disability Plans

- Impact of the recession on disability claims
- Dealing with recovery when there is no job in sight
- How to address stressors prior to disabling events

**Speaker: Liz R. Scott, Ph.D., M.Eng., M.B.A., M.Sc.,
B.Sc., R.N., COHN-S, CRSP, CDMP**

Principal
Organizational Solutions, Inc.
Burlington, Ontario

5:30-7:00 p.m.

Welcome Reception/Dinner

Guests welcome (\$50 guest fee)

THURSDAY, AUGUST 20, 2009

7:30 a.m.-3:45 p.m.

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Actuarial Valuations in 2009—A Year of Crisis

- General financial outlook for Canadian plans
- To file or not to file?
- Is solvency relief in sight?
- Impact on funding policies
- Longer term funding strategies

Speaker: John W. Crouse, M.A., FSA, FCIA

National Director, Benefits/Consulting
Johnson, Inc.
Edmonton, Alberta

9:30-9:45 a.m.

Refreshment/Break

9:45-10:45 a.m.

Overview of Monetary Incentives in the Public Employee Sector

- Plan member compensation
- Incentive packages—Are they or should they be pensionable?

Speaker: Jill Wagman, FSA, FCIA

Principal
Eckler, Ltd.
Toronto, Ontario

10:45-11:00 a.m.

Refreshment/Break

11:00 a.m.-12:00 noon

Phased Retirement

- What approaches might plans take?
- What does legislation permit?
- What should pension plans and plan members consider?

Speaker: Victoria Grabb, M.B.A., CMC

Pension Consultant
Victoria, British Columbia

12:00 noon-1:15 p.m.

Luncheon

1:15-2:15 p.m.

Infrastructure Investing

- What is it?
- Is it part of the asset mix for all plans?
- What percentage do you invest and to what extent?

Speaker: Keith G. Smith, CFA

President
GE Asset Management—Canada
Mississauga, Ontario

THURSDAY, AUGUST 20, 2009 (cont.)

2:15-2:30 p.m.

Refreshment/Break

2:30-3:30 p.m.

What Constitutes Good Governance in Today's Capital Market?

- Recent examples of successful governance
- Recent examples of disastrous governance
- What is the balance between governance and regulation?
- Taking your governance responsibilities to a new level

Speaker: Doug Pearce

Chief Executive Officer and Chief Investment Officer
British Columbia Investment Management Corporation
Victoria, British Columbia

3:30-3:45 p.m.

Refreshment/Break

3:45-4:45 p.m.

Open Forum

Questions that were not answered during the course of the day

Panelists: **John W. Crouse**

Victoria Grabb

Doug Pearce

Keith G. Smith

Jill Wagman

RELATED READING

Employee Benefits in Canada

Third Edition Revised

Raymond Koskie, Mark Zigler, Murray Gold and Roberto Tomassini, Editors

An introduction to the general principles and administration of public and private employee benefit plans in Canada. Both new and seasoned employee benefits professionals will find this a useful reference on pension, health and other benefit programs. (International Foundation)

520 pages. 2004. Item #5794.

\$97 (I.F. Members \$69). Includes shipping and handling.

To order, see registration form or www.ifebp.org/books.asp?5794.



Canadian Investment Issues

Second Edition—Resource Kit

A diverse set of current investment fund issues are covered in this collection of 16 articles and 113 article summaries. For new trustees, there are also articles addressing investment fundamentals and the legal aspects of managing trust funds. (International Foundation)

153 pages. 2008. Item #6528.

\$37 (I.F. Members \$30). Includes shipping and handling.

To order, see registration form or www.ifebp.org/books.asp?6528.

