You will work hard for each and every one of those letters—Own them. Each letter tells a story: Certified. Employee. Benefit. Specialist.
Begin Your Learning Journey With Instructor-Led Online Classes!

Summer brings to mind traveling and exploring. Would you rather take a scenic road trip or jet away somewhere distant for a vacation? Professional growth is also a journey. There are milestones, changes in direction, self-discovery, acceleration and growth! What’s your ultimate career destination? How about a new designation? The new CEBS will put you on the map in the employee benefits field. Earning your CEBS proves you have the know-how to direct your plan and will be a landmark in your career trajectory.

Would you like a little extra help with understanding the new CEBS curriculum? A 12-week, instructor-led online class is available. An instructor-led online class is a great way to complement your independent study. Your CEBS instructor is an experienced benefits professional with real-life expertise. Whether you choose a vacation or a staycation this summer, class is accessible at any time during the 12-week session—All you need is an Internet connection! A variety of tools and materials lets you design a learning plan to fit your personal learning style. An online class will connect you with other benefits professionals and help you take a deep dive into the curriculum to get ready for your CEBS exam. With an online class, you get:

- Instructor notes
- Audio overview of each module
- Quizzes and interactive games
- Discussion
- Activities based on the Benefits in Action cases
- Live review sessions
- Opportunity to ask questions and network with others in the class

Three Tips to Study Smarter

Lists aren’t just for tasks you need to do. They’re a great tool for taking inventory of your learning too. Here are some lists you can make for each module to help yourself get ready for your CEBS exam.

- List three or four Key Terms from the module that were completely new to you or a bit challenging for you to grasp. This will help you identify what you need to study the most.
- List three or four important numbers from the module such as dates that legislative changes were enacted, law or code numbers, or threshold limits for contributions.
- Write two or three questions you have about the module’s content. Review the module and see if you can answer your questions. If you need some clarification, post your questions in the discussion forum of your online class to see what your instructor and classmates think.

Online Class Schedule

**Summer 2018**
May 21-August 10
GBA 1—Managing Benefit Plans Part 1
GBA 2—Managing Benefit Plans Part 2
GBA/RPA 3—Navigating the Plan Environment
RPA 1—Managing Retirement Plans Part 1

**Fall 2018**
August 27- November 16
GBA 1—Managing Benefit Plans Part 1
GBA 2—Managing Benefit Plans Part 2
GBA/RPA 3—Navigating the Plan Environment
RPA 1—Managing Retirement Plans Part 1
RPA 2—Managing Retirement Plans Part 2
Meet the Instructor
Cindy Arcand, CEBS, CHRP
GBA 2—Managing Benefit Plans Part 2

Cindy on the value of the new CEBS program:
“The only constant about employee benefits is change, and this has always been reflected in the CEBS curriculum as well as the approach to learning. The new CEBS program is streamlined—concise yet comprehensive. The addition of Benefits in Action and the Capstone Cases brings theory into the workplace as practical applications of the concepts learned. Throughout my working career and postsecondary teaching, the CEBS program has always been a cornerstone for me. It’s also the standard that I look for in staff and colleagues.”

Course Corner

Study materials for courses in the redesigned program are available for purchase now. All study materials are available through Books for Business. Order online at www.booksforbusiness.com or by calling (800) 387-1417. Please check your online Study Guide or the Readings Update for Canadian Courses page for any study materials updates.
What’s in a Name? Pride (In the Name of CEBS)

Well, hello. My name is Lisa Kaiser, and I’m pleased to introduce myself as the Society President for 2018. I’d be remiss if I didn’t kick off 2018 by recognizing the amazing volunteers I’ve met in the ISCEBS community and thanking all who give their time and talents to make the Society a better place to belong.

(I don’t know if you saw what I did in that first paragraph, but I was envisioning one of the ubiquitous red or blue “Hello, My Name Is ____” stickers when I drafted the intro. I wanted to be friendly and extend my greetings, hoping you’d feel welcomed and comfortable enough to settle in and read some more.)

Belonging, or a sense of community, is important to any group. And in a professional association such as ours, identity and cohesiveness are critical to success over the long term. Creating a recognizable place for belonging enhances the well-being of the community member, since it is an absolutely essential human need somewhere at the middle of Maslow’s pyramid. To sustain the community, its caretakers must actively cultivate meaning and reinforce the markers of identity. For ISCEBS, that begins with the name.

And what’s in a name? The band and others might weigh in as to the values of a name, but for those who hold the CEBS credentials, which are the basis for the Society, we know exactly what’s in our name. (And, sidebar: If you haven’t heard it pronounced, say each letter of this important acronym. For example, we don’t call CPAs “sipas.”) You will work hard for each and every one of those letters—Own them. Each letter tells a story: Certified. Employee. Benefit. Specialist.

Through CEBS, we have gained measurable knowledge, having been weighed and found not wanting through the examination process. We focus on and serve employees through their benefits plans (as opposed to social programs, government schemes or other aspects of remuneration). We dig deep. We specialize in our knowledge, even though the breadth of the employee benefits field may be breathtaking.

Collectively, we are the go-to experts for clients, employers, employees and dependents, members and others who need to know about employee benefits. The CEBS designation is an instant boost, on the resumé and an advantage | April 2018 | 4

We’re on the cusp of achieving some high points for the Society this year, which I’m sharing as my goals for 2018, namely:

- Getting real—the realization of new students starting their CEBS journey under the new curriculum and reengaged students finishing their designations
- Elevation-reaching a tipping point of new designation holders, combined with existing and renewing members, to surge membership to higher levels
- Amplification—support of International Foundation tools and marketing to increase awareness and name recognition for the CEBS designation and the Society.

Brand awareness matters, as we cleave to and identify with the CEBS and ISCEBS marks. In times of increased volatility, the stability and prestige of the CEBS designation matter, as does the deep, objective knowledge that is inherent in the Society. And the Society has chosen to continue to lead in the employee benefits field by investing in ongoing, deep and practical knowledge that practitioners can apply; ongoing, topical and relevant information for continuing education credentials; and connecting leaders across the country in chapters and through virtual communities.

We have challenges aplenty in the year ahead. In Canada, legalization of marijuana, fiduciary issues and providing benefits for an aging workforce remain top priorities. With Society support, we can tackle those issues as well as the latest developments in tax changes impacting U.S. employee benefits, total health reform, employer reporting requirements, ERISA erosion at the federal level, changes to the health care delivery system and more. And, together, we can focus on mental health concerns, increased emphasis on employee and retiree health, health care and technology innovations, data security issues and other trending topics you’re sure to see at the 2018 Symposium in Boston, Massachusetts.

Together, we:

- Inspire others to lead healthier lives and retire with dignity
- Demonstrate the fullness of our knowledge of incredibly complex topics to our employers, clients and employees/members
- Validate our knowledge by continuing to actively participate in the Society.

The last point is key: To be a strong Society, we need you. When we join together, our act of conscious, collective creation can build pride. Pride is a universal and important emotion, and those who are self-aware and have tapped in are often more successful and lead longer lives, since pride is a positive coping mechanism. (Note: (a) I’m not a psychologist, (b) this will sound a little familiar if you attended the 2017 Symposium in Denver, Colorado and (c) I mean the good kind of pride—the pride that drives us to figure out who we are and
to fill our lives with meaning—not the hubristic, seven-deadly-sins kind of pride.) Pride makes us care about how others see us and—just as importantly—how we see ourselves.

When chapter leaders talk about why they got involved in ISCEBS, or when members complete the Society survey, they tell us about advancing their careers, making connections, achieving and giving back. This, my friends, starts with and is rekindled by the spark of pride. Important milestones demonstrate your quest—earning your first designation, earning your CEBS, logging your hours to be CPE-compliant and, most certainly, earning your Fellowship. Listening to your pride is one of the best ways to figure out who you are, what you want out of life and how you can get there. Own your pride. It’s an ability not only to feel good about ourselves but also to use those feelings toward our own ends and to change lives.

What do you want your Society to be? How can it help you meet your goals and firm your footing? Individual answers will vary, but I believe strongly that burnishing the CEBS pin and partaking in the Society will help you find your path and ensure that someone is saying your name.

I’m CEBS proud. Four little letters that make a big difference. To make it work, it takes a resilient and formidable Society that is as strong as each individual member. Let the chain grow by making sure your name is on the list and that your contributions are worthy of the essential spark that got you started in the first place. In the words of Harvey Specter, “Work until you no longer have to introduce yourself.” You can let the CEBS on your business card be your calling card and do that bit for you.

Hello, my name is Lisa Kaiser, CEBS, ISCEBS Fellow, and it’s my pleasure to serve you.

Lisa Kaiser, CEBS, ISCEBS Fellow, is the 2018 ISCEBS President. She is fund administrator for Plumbers and Pipefitters Local 189 in Columbus, Ohio.

**Attend the Symposium for Targeted Topics and Actionable Takeaways**

The 2018 ISCEBS Symposium, the must-attend event for benefits professionals, is just around the corner. The Westin Copley Place hotel in Boston, Massachusetts will host this event, which will be held August 26-29, 2018. Stay up to date with current topics in benefits, listen to thought-provoking and informative speakers, and network with your colleagues.

The sessions will be grouped into four educational tracks, including one dedicated specifically to Canadian topics. Here is a sample of some of the sessions that await you in Boston.

- Blockchain Technology for Employee Benefits
- Canada Legal/Legislative Update
- The Blueprint for Successful Diabetes Management
- Disability Management Audit
- The Legalization of Marijuana and Its Effect on Health and Welfare Plans
- Capital Accumulation Plans: The Past, Present and Future
- Pharmacogenetics and the Value of Personalized Medication Management
- Sustainability Doesn’t Equal Adequacy

Visit [www.iscebs.org/symposium](http://www.iscebs.org/symposium) for the full agenda, including speakers, descriptions, takeaways and more.
Employee Benefits
Symposium
August 26-29, 2018 | Boston, Massachusetts
#18Symp

Register Now and Save!

PARTNERS IN EDUCATIONAL EXCELLENCE
REGISTRATION/2018
ISCEBS Employee Benefits Symposium (18SYMP)
August 26-29, 2018 | The Westin Copley Place | Boston, Massachusetts

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See our policies regarding your registration/cancellation/refund/record retention/photo release and privacy at www.iscebs.org/policies.

### REGISTRATION INFORMATION

#### REGISTER NOW!

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#### ISCEBS Member Rates

- **Local**
- **Corporate**
- **Special Guest Rates**
- **Nonmember Rates**
- **New CEBS, CMS, GBA or RPA Graduates**

* Earned designation between September 1, 2017 and September 1, 2018. (If you earned your designation after September 1, 2017 and elected to go to the Conferment and Symposium in Denver, you must pay the regular registration fee for Boston.)

** Includes 2018 ISCEBS membership.

*Includes a 2018 International Foundation membership for new members only.

#### Payment

The Symposium registration fee must accompany this registration form. Registration fees can be paid by check or credit card. If you wish to pay the registration fee in Canadian funds, please use the equivalent Canadian rate in effect at the time you submit the registration fee.

- **Approximately what year did you begin working in employee benefits?**
- **Level of responsibility**
  - Senior management
  - Middle management
  - Operations
  - Other
- **CEBS Conferment (Sunday, August 26, 5:00 p.m.)**
  - Yes, I plan to attend the ceremony and reception.
- **Golf Outing**
  - I am a new CEBS GBA RPA CMS ISCEBS Fellow
  - Please send me information on the golf outing.
- **Special Guest Registration**
  - I am registering as a "guest" and have been invited by the following Society member or International Foundation corporate member.

### HOTEL

- **US$279 single/double occupancy**
- **No hotel required**

- **Before**
  - **Departure date**
  - **Number of persons**
  - **Special requests/Dietary requests**

- **A hotel deposit of one night's room rate is required.**

- **Please use a credit card to secure your hotel deposit.**
  - **Visa**
  - **MasterCard**
  - **Discover**
  - **American Express**

- **Credit card #**

- **Exp. date**

### CONTINUING EDUCATION CREDIT

- **US$25 continuing education service charge due at time of registration (if applicable).**
  - The International Society will apply for CE credit based on requests. You must indicate the profession for which credit is requested.

  - **Actuary**
  - **Attorney/Lawyer**
  - **CFP**
  - **CIMA**
  - **CPA**
  - **Insurance Producer/Agent**
  - **PHR/SPHR/GPHR**

  - **SHRM-CP/SHRM-SCP**
  - **Other, specify**

  - **License/NPN/BAR/CPA #**

- **Licensed in the state/province of**

  - **Preapproval of programs/seminars is required in all insurance states. This process can take up to 90 days. Alberta requires the Society to submit sessions for review 15 days prior to the program. Late requests could preclude insurance producers/agents from earning credit. Note: Requests made for CE credit on this form do not guarantee administration of credit.**

### CE inquiries: **(262) 786-6710, option 2, or e-mail continuinged@ifebp.org.**

### PAYMENT INFORMATION

- **Check**
  - **US$**
  - **Exp. date**

- **Cardholder's name (print)**

### REGISTRATION/ORDER SUMMARY

- **Symposium fee** US$
- **Continuing education service fee (US$25)** US$
- **Total (U.S. funds)** US$

Questions, e-mail iscebs@iscebs.org, or phone (262) 786-8771.
Save the Date to Celebrate!

Two Upcoming CEBS Graduation Recognition Events

Have you just completed your CEBS or specialty designation? Are you looking for a reason to cross the finish line? 2018 is the year to reach your goals! You went above and beyond, and now is your time to shine at a special event for celebrating your diligence and achievements. You’ll also get to meet benefits professionals from all over North America who have the same passion for employee benefits as you.

Representatives from the International Foundation and Dalhousie University will take part in each of these events. All new graduates, specialty designees and first-time ISCEBS Fellows are invited to attend.

CEBS Conferment Ceremony
Sunday, August 26
Boston, Massachusetts

Each year, the conferment ceremony is held in conjunction with the ISCEBS Symposium. The conferment kicks off the annual Symposium—2½ days of education sessions, networking and discussion opportunities with some of the brightest minds in the business. A special Symposium registration rate is available for new graduates.

CEBS Graduate Recognition Reception
Thursday, November 1
Toronto, Ontario

This event brings together new graduates from across Canada to recognize and celebrate their accomplishments and dedication to the employee benefits profession. Registration is complimentary for you and one guest.

Complete program details for each event will be sent to all eligible individuals.
If you have any questions, please contact CEBS at cancebs@ifebp.org.
CEBS Graduates—Canada
November 2017 through March 2018

ALBERTA
Tara Azadeh, CEBS
Retirement Services Advisor
Suncor Energy Inc.
Calgary, AB

Thomas J. Bauer, CEBS
Renewal and Sales Associate
Manulife Financial
Calgary, AB

Agnes Chu, CEBS
Calgary, AB

Deborah M. Currie, CEBS
Administrative Support
IV Pension Assistant
Alberta Health Services
Calgary, AB

Karine D’Astous, CEBS
Pension Specialist
Xerox Canada
Calgary, AB

Nataliya Fedorko, CEBS
Senior Advisor—Benefits
WestJet Airlines
Airdrie, AB

Rebekah L. Giguerre, CEBS
Edmonton, AB

Mycheil S. Gilbert, CEBS
Cochrane, AB

David J. Guttmann, CEBS
Technical Consultant
Gallagher Benefit Services (Canada)
Calgary, AB

Patrick A. Hardie, CEBS
Account Executive
Rogers Insurance Ltd.
Calgary, AB

Philip Heuchert, CEBS
Senior Advisor
Alberta Health Services
Leduc, AB

Colin D. King, CEBS
Group Financial Services Manager
Servus Credit Union
Edmonton, AB

Meng Camille Li, CEBS
Pension and Benefits Administrator
Calgary District Pipe Trades
Calgary, AB

Colleen S. Macdonald, CEBS
Calgary, AB

Christiane Maletz, CEBS
Benefits Representative
City of Edmonton
Sherwood Park, AB

J. Glenn McAtthey, CEBS
Director, Insurance Services
Alberta Medical Association
Edmonton, AB

William J. McNerney, CEBS
Group Benefit Advisor
Servus Wealth Strategies
Edmonton, AB

Regeena B. Peter, CEBS
Compensation and Benefits Advisor
Workers Compensation Board–AB
Edmonton, AB

Christopher M. Smith, CEBS
Analyst
Benefit Consultants Inc.
Edmonton, AB

Janice Tanas, CEBS
Sales and Client Relationship Coordinator
Sun Life Financial
Calgary, AB

Nadeem Tarmohamed, CEBS
Calgary, AB

BRITISH COLUMBIA
Teresa M. Bieler, CEBS
Account Manager and Employee Session Specialist
GroupHealth North
Prince George, BC

Nicholas M. Chu, CEBS
Port Coquitlam, BC

Mark V. Costales, CEBS
Group Benefits Consultant
Johnson Inc.
Langley, BC

Daniel Fortuna, CEBS
Benefits Consultant
DRF Benefits Inc.
Surrey, BC

Wojtek W. Golebiowski, CEBS
Client Relationship Manager
Manulife Financial
Vancouver, BC

Jo-Ann Hannah, CEBS
Mount Currie, BC

Andrew D. King, CEBS
Group Customer Service Consultant
Apri Insurance Services
Vancouver, BC

Fangyu Li, CEBS
Senior Analyst
Morneau Shepell
Vancouver, BC

Matthew J. P. Lister, CEBS
Employee Benefit Advisor
Davis Benefits and Pensions Ltd.
Surrey, BC

Maury Lum, CEBS
Account Executive
Manulife Financial
Vancouver, BC

Kim L. Madill, CEBS
Financial Security and Benefits Advisor
Langley, BC

Nadine Pelletier, CEBS
Maple Ridge, BC

Lane P. L. Quelch, CEBS
Account Executive
Sun Life Financial
Vancouver, BC

Rufat Ramazanov, CEBS
Pension Analyst
Morneau Shepell
Vancouver, BC

Mark- Anthony Sawires, CEBS
Account Associate
Manulife Financial
Vancouver, BC

Tunde Szamoskozi, CEBS
Member Benefits Trust
Vancouver, BC

Agnes M. Tecson, CEBS
Disability Case Manager
Vancouver Police Department
Vancouver, BC

Jo-Ann Hannah, CEBS
Mount Currie, BC

(continued on next page)
CEBS Graduates (continued from previous page)

**ONTARIO**

Glorie A. Alfred, CEBS  
Consultant  
Morneau Shepell  
Toronto, ON  

Andia N. Bacchas, CEBS  
Morneau Shepell  
Toronto, ON  

Jeffrey C. Baldwin, CEBS  
President  
BPA Financial Group Ltd.  
Mississauga, ON  

Tessa E. Bedard, CEBS  
Sun Life Financial  
Mississauga, ON  

Andrew K. Braithwaite, CEBS  
Financial Education Specialist  
Manulife Financial  
Toronto, ON  

Carolane Brasseur, CEBS  
Service Specialist  
Great-West Life Assurance Co.  
Ottawa, ON  

Kyle Campbell, CEBS  
Ridgeway, ON  

Kevin Chan, CEBS  
Toronto, ON  

Kitbo Choi-Nguyen, CEBS  
Robertson, Eadie & Associates  
Oakville, ON  

Geoffrey W. Davis, CEBS  
Benefits Coordinator  
Ottawa Police Association  
Ottawa, ON  

Kim M. Dixon, CEBS  
Senior Presale Marketing Consultant  
Manulife Financial  
Kitchener, ON  

Ryan P. Geerts, CEBS  
Senior Advisor Benefits and Pensions  
The Canadian Shield Group  
Toronto, ON  

Kelly M. Gilbert, CEBS  
Compensation and Benefits Specialist  
SGS Canada Inc.  
Lakefield, ON  

James M. Guest, CEBS  
Toronto, ON  

Kelly M. Hawthrone, CEBS  
Lead Associate Health and Benefits  
Willis Towers Watson  
Toronto, ON  

Kristina A. Hendren, CEBS  
Ottawa, ON  

Shirley A. Hennessy, CEBS  
National Director  
Manulife Financial  
North York, ON  

Karen Hepburn, CEBS  
Consultant  
FIS  
Pickering, ON  

Allison P. Hogan, CEBS  
Manager Pension Policy  
Canada Post Corp.  
Ottawa, ON  

Marnie L. Niemi Hood, CEBS  
Chief Executive Officer  
TEIBAS Ltd.  
Toronto, ON  

Yan Hou, CEBS  
Payroll Analyst, Payroll, Benefits and Total Rewards Department  
Coughlin and Associates Ltd.  
Ottawa, ON  

Pierre R. Hunault, CEBS  
Group Benefit Consultant  
Dibrina Sure Group  
Toronto, ON  

Kathleen D. Hunter, CEBS  
Human Resources Generalist  
The Royal  
Ottawa, ON  

Paul W. Ibbott, CEBS  
Account Executive Group Benefits  
Great-West Life Assurance Co.  
London, ON  

Alison Kaczmarczyk, CEBS  
The City of London  
London, ON  

Jeffrey Kearns, CEBS  
Employee Benefits Specialist  
Great-West Life Assurance Co.  
Kanata, ON  

Anastasija Kulikova, CEBS  
GBRS Education Coordinator  
Manulife Financial  
Toronto, ON  

Sophia J. Lam, CEBS  
Toronto, ON  

Aldine Lawson, CEBS  
Consultant Payroll/HR Implementation  
Alamoay Consulting  
Brampton, ON  

Kyle M. Leroeye, CEBS  
Account Executive  
Empire Life Insurance Co.  
Burlington, ON  

Mark W. Locke, CEBS  
Producer  
IPF Group Ontario Ltd.  
Markham, ON  

Erica Macfarlane, CEBS  
Executive Assistant  
Manulife Financial  
Kitchener, ON  

Greg MacLellan, CEBS  
Financial Advisor  
Freedom 55 Financial  
North Bay, ON  

Patrick M. Malloy, CEBS  
Benefits Consultant  
BFL Canada Consulting Service Inc.  
Toronto, ON  

Denise K. Marshall, CEBS  
Controller  
Benefit Partners Inc.  
Sudbury, ON  

Sarah McCurrie, CEBS  
Director, Human Resources  
Colliers Project Leaders  
Mississauga, ON  

Nick Mihaylov, CEBS  
Toronto, ON  

Olena Myssyshyn, CEBS  
Pension Fund Financial Analyst  
Goodyear Canada Inc.  
Etobicoke, ON  

Dianna Ospina, CEBS  
Benefits Advisor Human Resources  
Healthcare of Ontario Pension Plan  
Toronto, ON  

Amanda C. Paul, CEBS  
Associate Underwriter  
RBC Insurance  
Mississauga, ON  

Thomas M. Perkes, CEBS  
Senior Director Operations and Business Development  
Ontario Federation of Agriculture  
Guelph, ON  

Samantha J. Perrin, CEBS  
Chief Financial Officer  
Canadian Teachers Federation  
Ottawa, ON  

(continued on next page)
CEBS Graduates (continued from previous page)

Jiani Qin, CEBS
Financial Analyst Employee Benefits
Great-West Life Assurance Co.
Windsor, ON

Linda M. Rajacic, CEBS
Technical Underwriter
ENCON Group Inc.
Mississauga, ON

Leanne N. Roth, CEBS
Manulife Financial
Waterloo, ON

Patricia Ruiz, CEBS
Service Representative
Manulife Financial
London, ON

Bijantee M. Sanasy, CEBS
Bilingual Payroll and Benefits Consultant
LV Lomas Ltd.
Brampton, ON

Paul C. Scott, CEBS
Employee Benefits Specialist
ZFS Benefit Solutions
St. Catharines, ON

James Michael Stapleton, CEBS
Certified Financial Planner
Freedom 55 Financial
Mississauga, ON

Michael R. Steffler, CEBS
Consultant
The Benefits Company
Windsor, ON

Derek T. Szeto, CEBS
ENCON Group Inc.
Mississauga, ON

Bev J. Traynor, CEBS
Employee Benefit Services
Manulife Financial
Kanata, ON

Helen Tsotso, CEBS
SEB Administrative Services Inc.
Mississauga, ON

Taylor Valée, CEBS
Analyst
Aon Hewitt
Toronto, ON

John R. Vandeweerd, CEBS
President
Benefits International
Hamilton, ON

Ryan Warner, CEBS
Director Sales and Marketing
PPI Benefits Inc.
Kitchener, ON

Lindsay Webb, CEBS
Burlington, ON

Deborah J. Widdifield, CEBS
Ottawa, ON

Marcus Wong, CEBS
Toronto, ON

Chui Niook Sandrine Lam Po Yuen, CEBS
Client Relationship Manager
Manulife Financial
Toronto, ON

QUEBEC

Wesley Fernandes, CEBS
Sales Director
Manulife Financial
Montreal, QC

Konrad Koloda, CEBS
Group Underwriter
Sun Life Financial
Montreal, QC

Sebastien Poirier, CEBS
Product Manager Group
Savings and Retirement
Industrial Alliance
Quebec, QC

Sharon Ha Yeung, CEBS
Group Benefits Advisor
Ogilvy & Ogilvy Inc.
Westmount, QC

SASKATCHEWAN

Evelyn McGaughy, CEBS
Owner
Eureka Consulting
Saskatoon, SK

Rita L. Rushton, CEBS
Account Manager
Co-operators Life Insurance Co.
Regina, SK

James K. Stangel, CEBS
Regional Sales Leader
and National Accounts
Group Medical Services
Regina, SK

UNITED STATES

Katherine Lacy-Wilson, CEBS
Area AVP Compliance Counsel
Arthur J. Gallagher & Co.
Bloomington, MN

Natasha A. Reid, CEBS
Wyoming, MI
Group Benefits Associates (GBAs)  
November 2017 through March 2018

ALBERTA
Erika Conyette, GBA  
Account Associate  
Manulife Financial  
Edmonton, AB

Lindsay Foth, GBA  
Senior Benefits Analyst  
Leighl Hanson  
Edmonton, AB

Paula J. Griffiths, GBA  
Benefits Specialist  
Norton Rose Fulbright Canada LLP  
Calgary, AB

Brendan Hickey, GBA  
Cochrane, AB

Sizani Maphosa, GBA  
Benefit Plan Coordinator  
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Account Manager  
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Team Manager  
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Eric James Gosden, GBA  
Regional Director  
Great-West Life Assurance Co.  
Port Coquitlam, BC

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Account Manager Benefits and Insurance  
Thomas O’Neill & Associates Inc.  
Vancouver, BC

Melissa M. Huston, GBA  
Financial Planner/Insurance Agent  
The Joshua Group Financial Services  
Victoria, BC

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Client Account Manager  
Johnstone’s Benefits  
North Vancouver, BC

Chun Mei Lau, GBA  
Burnaby, BC

Megan MacDonald, GBA  
Manager, Benefits  
First West Credit Union  
Surrey, BC

Emily J. Metcalfe, GBA  
Human Resources Advisor  
Regional District of Nanaimo  
Nanaimo, BC

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Great-West Life Assurance Co.  
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Ontario

Chantal Archambault, GBA  
Group Underwriting Consultant  
Manulife Financial  
Toronto, ON

Cory F. Bennetts, GBA  
Equitable Life  
Kitchener, ON

Dennis F. Caponi Sr., GBA  
President  
Caponi Managed Group Benefits  
Toronto, ON

Janice R. Clarke-Sinclair, GBA  
Human Resources Coordinator  
Empire Life  
Kingston, ON

Lorraine Laville, GBA  
Amendment Coordinator II  
Empire Life  
Georgetown, ON

Marina Lodyga, GBA  
Senior Advisor, Pension and Benefits  
CPP Investment Board  
Toronto, ON

Tanya L. McKechnie, GBA  
Kanata, ON

Trevor W. Medeiros, GBA  
Renewal Analyst  
Great-West Life Assurance Co.  
London, ON

Jennifer Morley, GBA  
Renewal Associate  
Manulife Financial  
Kitchener, ON

Cynthia Pang, GBA  
Kitchener, ON

(continued on next page)
GBA Designees (continued from previous page)

Sheetal Patel, GBA  
Specialist National Disability Practices  
Manulife Financial  
Toronto, ON  

Cassandra E. Price, GBA  
Benefits and Retirement Analyst  
Owen & Associates  
Collingwood, ON  

Sarah A. Rains, GBA  
Union, ON  

Joonyong Sung, GBA  
Group Underwriter  
Great-West Life Assurance Co.  
Oakville, ON  

Rory Taylor, GBA  
Client Service Representative  
Green Shield Canada  
Windsor, ON  

Nicole E. Tobola, GBA  
New Hamburg, ON  

Bijlana Vlaski, GBA  
Group Underwriting Analyst  
Manulife Financial  
Kitchener, ON  

FengLan Zhan, GBA  
Toronto, ON  

Eureka-Lissa Noel, GBA  
Manager, Training and Development  
Manulife Financial  
Montreal, QC  

Maria Davila Ortiz, GBA  
New Business Analyst Montreal Underwriting Unit  
Great-West Life Assurance Co.  
Anjou, QC  

Colin Sutton, GBA  
Sun Life Financial  
Chateauguay, QC  

Tito L. Tabora-Mayrand, GBA  
Senior Analyst Group Benefits Administration  
Morneau Shepell Inc.  
Montreal, QC  

Patricia J. Boechler, GBA  
Saskatoon, SK  

David Stearn, GBA  
Commercial Insurance Advisor  
HAL Insurance  
Regina, SK  

Compensation Management Specialists (CMSs)  
November 2017 through March 2018  

ALBERTA  
Leslie L. Bannon, CMS  
Compensation Analyst  
Altagas  
Calgary, AB  

Wayne E. Ormond, CMS  
Human Resources Director  
Husky Energy Inc.  
Calgary, AB  

BRITISH COLUMBIA  
Patricia Fong, CMS  
Payroll Coordinator  
Vancouver Fraser Port Authority  
New Westminster, BC  

Preet Pall, CMS  
Associate  
Montridge Advisory Group Ltd.  
Vancouver, BC  

Sarah J. Purslow, CMS  
Human Resources  
Advisor, Compensation  
Tolk Industries Ltd.  
Vernon, BC  

MANITOBA  
Corrin Musey Denisuik, CMS  
Senior Compensation Officer  
Interlake Eastern Regional Health Authority  
Stony Mountain, MB  

NOVA SCOTIA  
Paula K. Judge, CMS  
Compensation Specialist  
Healthy Association Nova Scotia  
Lower Sackville, NS  

ONTARIO  
Qun Bai, CMS  
Richmond Hill, ON  

Nicolas Boulerice, CMS  
Rockland, ON  

Ying Cheng, CMS  
Compensation and Benefits Analyst  
Allstate Insurance Company of Canada  
Markham, ON  

Gary Filiatrault, CMS  
Human Resources Services Supervisor  
Caesars Windsor  
Tecumseh, ON  

Alison Kaczmarsczyk, CMS  
The City of London  
London, ON  

Shayan Methot, CMS  
Financial Analyst  
Great-West Life Assurance Co.  
Oshawa, ON  

Amanda C. Paul, CMS  
Associate Underwriter  
Royal Bank of Canada  
Mississauga, ON  

Rupinder Shahi, CMS  
Coordinator Payroll and Benefits  
ERCO Worldwide  
Mississauga, ON  

QUEBEC  
Melissa Allard, CMS  
L’assomption, QC  

SASKATCHEWAN  
Cynthia J. Anderson, CMS  
Manager Membership Benefits and Insurance  
Saskatchewan Medical Association  
Saskatoon, SK  

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## Retirement Plans Associates (RPAs)

November 2017 through March 2018

### ALBERTA
- **Michelle Lynn Greenshields, RPA**
  - Pension Service Coordinator
  - Manulife
  - Edmonton, AB
- **Mette Kondrup, RPA**
  - Pension Team Lead
  - City of Edmonton
  - Edmonton, AB
- **Catherine A. Legge, RPA**
  - Relationship Manager
  - Royal Bank of Canada
  - Calgary, AB
- **Lynn A. Molvik, RPA**
  - Group Consultant
  - Royal Bank of Canada
  - Calgary, AB
- **Sarah L. Murray, RPA**
  - Client Relationship Manager
  - Manulife
  - Edmonton, AB

### BRITISH COLUMBIA
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  - Royal Bank of Canada
  - Kelowna, BC
- **Jonathan Bones, RPA**
  - Group Benefits Consultant
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  - Vancouver, BC
- **Sandhya Braganza, RPA**
  - Burnaby, BC
- **Traci Lynn Desrosiers, RPA**
  - Group Consultant
  - Royal Bank of Canada
  - Vancouver, BC
- **Kristin A. Dolynski, RPA**
  - Vice President, Group Advantage
  - Royal Bank of Canada
  - Kelowna, BC
- **Lauren M. Dressler, RPA**
  - Senior Service Representative
  - Great-West Life Assurance Co.
  - Vancouver, BC
- **Robert Grad, RPA**
  - Manulife Financial
  - Vancouver, BC
- **Margaret Yee Lin Hamilton, RPA**
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  - Royal Bank of Canada
  - Courtenay, BC
- **Lakhbir K. Johal, RPA**
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  - Relationship Manager
  - Royal Bank of Canada
  - Surrey, BC
- **Rajeshwari Kumar, RPA**
  - Group Consultant
  - Royal Bank of Canada
  - Richmond, BC
- **Brenna MacLean, RPA**
  - Associate Consultant
  - E3 Advisory
  - Vancouver, BC
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  - Group Consultant
  - Royal Bank of Canada
  - Vancouver, BC
- **Laura Smeltzer, RPA**
  - Pension and Benefits Advisor
  - Teck Resources Ltd.
  - Vancouver, BC
- **Dawn Torroba, RPA**
  - Royal Bank of Canada
  - North Vancouver, BC

### NEWFOUNDLAND
- **John M. Bennett, RPA**
  - Group Consultant
  - Royal Bank of Canada
  - St. John's, NL
- **Karen M. Hollahan-Squires, RPA**
  - Relationship Manager
  - Royal Bank of Canada
  - Mount Pearl, NL

### NOVA SCOTIA
- **Wesley G. Cook, RPA**
  - Pension Analyst
  - Morneau Shepell
  - Halifax, NS
- **Zachary Ward, RPA**
  - Royal Bank of Canada
  - Halifax, NS

### ONTARIO
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  - Relationship Manager
  - Royal Bank of Canada
  - Toronto, ON
- **Cosimo Cavaliere, RPA**
  - Group Consultant
  - Royal Bank of Canada
  - Maple, ON
- **Pasquale Ciulla, RPA**
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  - Royal Bank of Canada
  - Woodbridge, ON
- **Matthew A. Conilffe, RPA**
  - Senior Associate
  - Mercer
  - London, ON
- **Tiffany M. Flood, RPA**
  - Group Consultant
  - Royal Bank of Canada
  - Toronto, ON
- **Jennifer S. Gale, RPA**
  - Implementation Manager
  - National Accounts
  - London Life
  - London, ON
- **Nancy K. Geen, RPA**
  - Senior Human Resources Associate
  - Pathenon Inc.
  - Whitby, ON
- **Norah Isbister, RPA**
  - Toronto, ON
- **Gregory Jack, RPA**
  - Jack and Associates Financial
  - St. Catharines, ON
- **Harish Sunny Kapoor, RPA**
  - Client Relationship Manager
  - Manulife Financial
  - Woodbridge, ON
- **Jennifer Lau, RPA**
  - Scarbroough, ON
- **Kate Nazar, RPA**
  - Vice President
  - Client Solutions Centre
  - Sun Life Financial
  - Toronto, ON
- **Jeremiah Pike, RPA**
  - Group Consultant
  - Royal Bank of Canada
  - Brantford, ON
- **Joseph R. Popkey, RPA**
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  - Royal Bank of Canada
  - Kitchener, ON

### QUEBEC
- **Alexandra Lerebours, RPA**
  - Saint-Laurent, QC
- **Mark A. Papadopoli, RPA**
  - Senior Business Analyst
  - Manulife Financial
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### SASKATCHEWAN
- **Melanie Lishcynsky, RPA**
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  - Royal Bank of Canada
  - Saskatoon, SK
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