53rd Annual Canadian Employee Benefits Conference
August 16-19, 2020
Halifax Convention Centre | Halifax, Nova Scotia
Preconference: August 14-16, 2020

Conference Preview

www.ifebp.org/canannual
53rd ANNUAL CANADIAN
EMPLOYEE BENEFITS CONFERENCE
August 16-19, 2020 | Halifax Convention Centre | Halifax, Nova Scotia

Facing the New Decade

Many events continue to unfold daily that impact our personal lives along with our fiduciary responsibilities as trustees representing our plan members. Our way of working has changed dramatically due to the pandemic, and it is further altered by climate change, an aging workforce, mental health stigma, cybersecurity risks and fraud, all of which require trustees and staff of health and pension funds to be well-educated and trained in preparation for the “what-ifs” that may instantly affect our well-thought-out plans.

Despite the recent challenges that we are all experiencing, we are committed to providing the comprehensive education you have come to expect at the 53rd Annual Canadian Employee Benefits Conference. Covering trending topics affecting your members’ plans in sessions that range from introductory to advanced levels, there will be plenty for everyone. Discover what similar challenges your peers face, interact with industry experts through case studies and learn innovative tactics to apply to your fund. Find the answers you have been looking for and secure effective solutions to take back to your members’ plans.

BE PART OF OUR COMMUNITY.

Find the answers you need, and show your commitment to the funds you serve by registering today. Learn alongside and network with more than 1,100 of your peers, including:

- Multi-employer fund trustees, administrators, business managers and association leaders
- Public sector plan trustees, executive directors and staff
- Fund administrators and managers
- Accountants
- Actuaries
- Lawyers
- Benefits consultants
- Third-party administrators (TPAs)
- Investment managers and consultants
- Apprenticeship coordinators and instructors
- Trustees of training trust funds
- Others who are involved in the overall management of pension and benefit trust funds.

WHY SHOULD YOU ATTEND?

- You have a responsibility to your members to stay informed.
- Remain current with the latest regulatory and legislative changes and considerations.
- Learn new approaches from leading industry experts.
- Receive unbiased education to help secure long-term sustainability for your fund.
- Discover cost-saving measures and options to improve your funding.
- Take back and apply proven solutions used by your peers.
- Prepare for the future by learning about emerging trends.
- Meet with over 1,100 of your peers.
A Path for Trustee Education

See pages 14-19 for all course options offered in Halifax.

Integrated, assessment-based education—Foundations of Trust Management Standards (FTMS), Advanced Trust Management Standards (ATMS) and Master of Trust Management Standards (MTMS)—offers trustees/fiduciaries a clear, cohesive training path with the opportunity to validate learning through tests as they progress.

Together, FTMS, ATMS and MTMS provide the ideal blend of knowledge, skills and experience needed for effective management of trusts. To get the most value out of this education, it is recommended that attendees leave ample time between each step on the path to practice and apply their classroom learning at their board meetings. We understand that everyone learns at a different pace. The recommended educational path below is a best practice based on the feedback we have received from attendees and instructors.

Recommended Educational Path

Years of experience as a trustee/fiduciary

**FTMS**
- Up to Two Years

**ATMS**
- Two to Four Years

**MTMS**
- More Than Four Years

“There is something for everyone that is carefully tailored to Canadian content and experience, with well-qualified presenters and lots of networking opportunities.”

Cameron Deacoff, Halifax Regional Municipality Pension Committee Member, Halifax Regional Municipality Pension Plans, Halifax, Nova Scotia
Who should consider a preconference program?

Preconferences are a great way to kick-start your experience. Based on your role and interests, find the options that best fit your educational needs.

NEW TRUSTEES
Uncover the fundamental responsibilities involved with being a fiduciary of a plan or trust ahead of the Annual Canadian Conference.

• Foundations of Trust Management Standards (FTMS) for trustees with less than 2 years of experience

INTERMEDIATE TRUSTEES
Continue to build upon your past education and gain practical knowledge through an additional level of experience, interaction and case studies.

• Advanced Trust Management Standards (ATMS) for trustees with 2+ years of experience

EXPERIENCED OR SOPHISTICATED TRUSTEES
The latest step in our trustee path of higher education challenges trustees to take a leadership role in their fund and update their skill set.

• Master of Trust Management Standards (MTMS) for trustees with 4+ years of experience

RETIREMENT EDUCATION for all attendees

• Health, Wealth and Happiness—Planning Your Path to a Successful Retirement (Part 1)
• Health, Wealth and Happiness—Living Your Best Retirement (Part 2)

APPRENTICESHIP EDUCATION for stakeholders of apprenticeship programs
A three-day, hands-on workshop that will help seasoned and new professionals improve the development, delivery and evaluation of learning by providing a proven process to incorporate into their apprenticeship program.

• Designing Curriculum to Close the Skills Gap
Thursday, August 13
PRECONFERENCE ONLY Registration .......... 4:00-6:00 p.m.

Friday, August 14
PRECONFERENCE ONLY Registration .......... 7:00 a.m.-12:00 noon
Designing Curriculum Preconference .......... 8:00 a.m.-4:30 p.m.
FTMS Course .............................................. 8:00 a.m.-4:30 p.m.
ATMS Course ............................................. 8:00 a.m.-4:30 p.m.
MTMS Course ............................................. 8:00 a.m.-4:30 p.m.
Main Conference Registration ................. 12:00 noon-5:00 p.m.

Saturday, August 15
Registration ............................................ 7:00 a.m.-5:00 p.m.
Preconference Workshop ......................... 8:00 a.m.-12:00 noon
Designing Curriculum Preconference .......... 8:00 a.m.-4:30 p.m.
FTMS Course .............................................. 8:00 a.m.-4:30 p.m.
ATMS Course ............................................. 8:00 a.m.-4:30 p.m.
MTMS Course ............................................. 8:00 a.m.-4:00 p.m.

Sunday, August 16
Registration ............................................ 7:00 a.m.-5:00 p.m.
Preconference Workshops ....................... 8:00 a.m.-12:00 noon
Designing Curriculum Preconference .......... 8:00 a.m.-4:00 p.m.
Opening Entertainment* ............................. 4:15-4:45 p.m.
Opening Keynote* ...................................... 4:45-6:30 p.m.

Monday, August 17
Registration ........................................... 7:00 a.m.-4:30 p.m.
Welcome ................................................ 8:00-8:15 a.m.
Keynote Session ...................................... 8:15-9:15 a.m.
Featured Sessions ................................. 9:35-10:35 a.m.
10:55-11:55 a.m.
Lunch Break ....................................... 11:55 a.m.-1:30 p.m.
Breakout Sessions ............................... 1:30-5:00 p.m.

Tuesday, August 18
Registration ........................................... 7:00 a.m.-4:30 p.m.
Keynote Session ...................................... 8:00-9:00 a.m.
Featured Sessions ................................. 9:20-10:20 a.m.
10:40-11:40 a.m.
Lunch Break ....................................... 11:40 a.m.-1:15 p.m.
Breakout Sessions ............................... 1:15-4:45 p.m.

Wednesday, August 19
Registration ........................................... 7:00-11:30 a.m.
Breakout Sessions ............................... 8:00-10:15 a.m.
Finale Session* ....................................... 10:30-11:30 a.m.

*Guests are welcome to attend.
SUNDAY OPENING KEYNOTE

Our National Stories: Inspiring Canadians at Home and Abroad
August 16 | 4:45-6:30 p.m.

Mr. Mansbridge ties all of his talks together with his desire to see Canadians celebrate their heritage: to recognize that a shared national story has shaped us at both an individual and a collective level. This story is being written, and rewritten, every day, by all Canadians. Drawing on the world leaders he’s interviewed, Mr. Mansbridge also talks about leadership: what it takes and how it can be achieved, whether in politics, academia or business.

Peter Mansbridge
Chief Correspondent of CBC News and Anchor of The National for 29 Years
Toronto, Ontario

MONDAY MORNING KEYNOTE

Borders Are Back! Navigating a Fractured World
August 17 | 8:15-9:15 a.m.

Borders are now more prominent than they have been in the last forty years. Trade barriers, nontariff barriers, borders that keep out immigrants and borders in the digital world will shape growth and investment opportunities in the decade to come. Ms. Stein will walk you across these borders, pointing out the opportunities and the risks.

Janice Stein
Founding Director of the Munk School of Global Affairs and Public Policy
Belzberg Professor of Conflict Management
University of Toronto
Toronto, Ontario
TUESDAY MORNING KEYNOTE

Trump 2016 Redux? The Forthcoming U.S. Presidential Elections
August 18 | 8:00-9:00 a.m.

Should you already book your therapist for an appointment on November 4th? Should you fear some kind of nervous breakdown? Perhaps so. Mr. David will present the state of the race for the U.S. presidential elections and offer an overview of structural, political and individual factors that will impact the election and the issues at stake. The results will again probably be very close and bring us to the usual cliffhanger—a race and an outcome decided notably by a few states around the Great Lakes and the near Midwest. Important also will be the results called for the Senate races. How will all of this impact Canadians? Prepare yourself for the “Super Bowl” of American politics!

Charles-Philippe David
Full Professor, Department of Political Science—UQAM
Founder, Raoul Dandurand Chair of Strategic and Diplomatic Studies—UQAM
President, Centre for United States Studies—UQAM
Montreal, Quebec

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WEDNESDAY FINALE KEYNOTE

Relieving Work-Related Stress With Humour
August 19 | 10:30-11:30 a.m.

Stress is a major cause of most illnesses, and humour is an amazing way to relieve it. Harvard studies show that when you are stressed, your brain shrinks. However, when you laugh, you relax; and when you relax, you learn. This hilarious and inspirational session explores seven stress-relieving ingredients: a positive attitude, perseverance, forgiveness, teamwork, family and friends, mental activity and physical activity.

Judy Croon
Comedian
Toronto, Ontario

Simultaneous French translation of several keynote/plenary sessions will be offered.
La traduction simultanée en français de plusieurs conférences d’honneur et de conférences principales sera offerte.
MONDAY MORNING PLENARY 1  
The Economic Outlook: Will Things Improve in 2021 and Beyond?  
August 17  |  9:35-10:35 a.m.

Mr. Hodgson, long-time chief economist at the Conference Board of Canada, will provide his perspectives on economic performance and prospects in Canada and its provinces, the U.S., China and other regions. The global economy is being constrained by uncertainty, with slower growth projected in many places. Global growth has been deeply affected by Trump trade turmoil, by global epidemic, and by a variety of other global, regional and local factors (like Brexit), many of which have been negative. Will things improve? Probably not much overall—and where you live and work matters a great deal.

Glen Hodgson  
Senior Fellow, Public Policy Forum and C.D. Howe Institute  
Chief Economist, International Financial Consulting Ltd.  
Ottawa, Ontario

MONDAY MORNING PLENARY 2  
Legal/Legislative Developments Across Canada  
August 17  |  10:55-11:55 a.m.

This panel presentation will discuss proposed and recently passed legislation and regulations as well as court decisions affecting pension and health and welfare benefit plans.

Lisa C. Chamzuk  
Partner  
Lawson Lundell LLP  
Vancouver, British Columbia

Hugh Wright  
Partner  
Mclnnes Cooper  
Halifax, Nova Scotia

Mark Zigler  
Partner  
Koskie Minsky LLP  
Toronto, Ontario
TUESDAY MORNING PLENARY 1

Beating Your Bias

August 18  |  9:20-10:20 a.m.

What assumptions do you have when you see a woman wearing a headscarf? Well, think again. In this funny, honest and empathetic talk, Ms. Abdel-Magied challenges us to look beyond our initial perceptions and to open doors to new ways of supporting others.

Ms. Abdel-Magied will explore the concepts of unconscious bias and structural marginalization within societies and workplaces. In a lighthearted but incisive manner, she will illustrate how discrimination operates, what ways it ostracizes members of the group and what we as individuals and organizations can do about it.

Yassmin Abdel-Magied
Leadership and Diversity Expert
London, England

TUESDAY MORNING PLENARY 2

If There’s Something Strange in Your Main Network, Who Ya Gonna Call?

August 18  |  10:40-11:40 a.m.

This applied and interactive session will focus on how trustees can discharge their fiduciary responsibilities in the cybersecurity area. Topics will include:

- Understanding cyber risk as a business risk
- Managing cyber risks with key service providers such as custodians, third party administrators, investment managers, actuaries, and other advisors and agents
- How to establish a security-focused culture and the need for cyber resilience
- The importance of an incident response plan with preparation and training in advance
- Cyberinsurance.

Daniel Garrie, Esq.
Co-founder, Law and Forensics
Co-founder, Global Cyber Institute
Neutral, JAMS
New York, New York

David Cass
Vice President, Cyber and IT Risk,
Federal Reserve Bank of New York
Co-founder, Global Cyber Institute
New York, New York
Designing Curriculum to Close the Skills Gap

Friday, August 14, 2020 | 8:00 a.m.-4:30 p.m.
Saturday, August 15, 2020 | 8:00 a.m.-4:30 p.m.
Sunday, August 16, 2020 | 8:00 a.m.-4:00 p.m.

Registration code: 2029

Designing Curriculum to Close the Skills Gap is a three-day, hands-on workshop that will help seasoned and new professionals improve the development, delivery and evaluation of learning by providing a proven process to incorporate into their apprenticeship programs. Upon completion, participants will understand and be able to apply a systematic approach, based on the Developing a Curriculum (DACUM) model, to deliver a more impactful apprenticeship program. As a participant, you will:

- **LEARN** how to improve apprenticeship program performance with greater learner efficiency, effectiveness and engagement

- **GAIN** a foundation in analysis to ensure your training initiatives are aligned and have the impact you and your program expect

- **COLLECT** data from subject matter experts to identify competencies and skills that will enable the achievement of program (business) goals

- **SEQUENCE LEARNING** to enhance learning transfer to the worksite

- **BUILD** a curriculum road map that will prepare your program for success today and in the future

- **QUICKLY** and **EFFICIENTLY** create learning content that expedites a learner’s mastery of specific skills, enabling your program to meet the needs of your stakeholders

- **DETERMINE** expected performance levels of skills for successful employment and assess learning impact to drive continuous improvement.

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**Workshop Leaders**

**R. Lance Hogan, Ph.D.**
Professor
Eastern Illinois University, Lumpkin College of Business and Technology
Charleston, Illinois

**Luke J. Steinke, Ph.D.**
Professor
Eastern Illinois University, Lumpkin College of Business and Technology
Charleston, Illinois
**WHO SHOULD ATTEND**

This program is designed specifically to meet the needs and interests of stakeholders involved in apprenticeship training and education funds in both the United States and Canada:

- Training directors/coordinators
- Trustees/joint apprenticeship and training committee (JATC) members who work with curriculum
- Instructors/instructional designers
- Educators from community and technical colleges.

This program may be of special interest to small- or medium-sized training funds with limited resources who want a do-it-yourself approach to upgrading their curriculum.

“The explanations on everything about DACUM were done with great detail, and no question went unanswered. Change is good and change is necessary—I’m excited to implement this within my company.”

*Vanessa Nicholls-Thomas*
Curriculum Developer/E-learning
Operating Engineers Training Institute of Ontario
Morrisburg, Ontario

**REGISTRATION INCLUDES**

- Continental breakfasts, lunches and refreshment breaks
- Comprehensive take-home materials
- *DACUM: The Seminal Book, 2nd Edition*
- Networking opportunities

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**Program at a Glance**

**FRIDAY, AUGUST 14**

The New Workforce and Skills Gap
8:00 a.m.-12:00 noon
Focus on Skills
12:45-4:30 p.m.

**SATURDAY, AUGUST 15**

Occupational Analysis
8:00 a.m.-12:00 noon
How We Learn
12:45-4:30 p.m.

**SUNDAY, AUGUST 16**

Learning Module Development
8:00 a.m.-12:00 noon
Assessment of Achievement
12:45-4:00 p.m.
The financial planning workshops are designed for your personal financial, retirement, investment, estate and health planning needs. Concepts build from Saturday to Sunday; however, you will gain valuable information to bring back to your members whether you attend one or both workshops.

**PART ONE**

**Health, Wealth and Happiness—Planning Your Path to a Successful Retirement**

Saturday, August 15 | 8:00 a.m.-12:00 noon

**Registration code: PC01**  **Spouse/Guest code: PC11**

What could be more important than spending some quality time planning for your future and the future of your family? This informative and motivational two-part workshop will help you understand the importance of setting a vision for your retirement and planning ahead. What will retirement mean for you? How can you ensure a successful transition, where you enjoy the freedom, relationships and activities that you’ve always wanted? Our panel will offer you critical information and useful tips to help you better manage your health, investments and financial plan, as well as your personal legacy, all with a view to your successful retirement transition. With timely and practical insights, you’ll come away with an awareness that your health, wealth and happiness are very much in your control, and taking control of them is something to get excited about!

**In our first day, we’ll cover the importance of:**

- Knowing what matters most to you and setting a vision for your retirement
- Taking care of your body, mind and relationships
- Resources that contribute to well-being and wellness
- Investing for retirement—The basics you need to know
- Estate planning to create a meaningful legacy
- Setting priorities for your own financial plan.

**Workshop Leaders for Saturday and Sunday**

**Beverly Evans, CFP, CIM, EPC, TEP**  
Director, Wealth Management and Portfolio Manager  
Richardson GMP Ltd.  
Mississauga, Ontario

**Hilary Laidlaw, LL.B., TEP**  
Counsel  
Tax, Trusts and Estates Planning  
McCarthy Tétrault LLP  
Toronto, Ontario
PART TWO

Health, Wealth and Happiness—Living Your Best Retirement

Sunday, August 16 | 8:00 a.m.-12:00 noon

Registration code: PC02  Spouse/Guest code: PC12

Changes . . . choices . . . challenges—What’s in your future? Satisfaction in retirement is linked to several factors, and in the second part of this workshop series we’ll expand on how enjoying good health, adequate income, and meaningful relationships and roles can help you realize the retirement of your dreams, regardless of what the future holds. How will you weather uncertain and turbulent financial markets? Will you have to care for an aging relative or deal with adult children returning home? How do you want to provide for and be remembered by those you love? All of these considerations require a commitment to your planning. Learn to navigate the issues that will impact your own retirement planning with confidence and conviction. This workshop series is timely in content, comprehensive in scope and—most importantly—practical!

The program will continue with coverage of:

- The role of wellness in retirement transition and adjustment
- What makes people truly happy
- Identifying activities to give your life structure and purpose
- Financial planning in changing times
- The evolution of retirement income planning
- War or peace: Estate planning in practice
- Ensuring a smooth final transition.

Robert D. Reid, M.B.A., Ph.D.
Deputy Chief
Division of Prevention and Rehabilitation
University of Ottawa Heart Institute

Professor
Faculty of Medicine
University of Ottawa
Ottawa, Ontario
Course Objective
Increase knowledge and understanding of the basics of the four key knowledge areas of effective management of trusts: Legal, Administration, Governance and Funding/Investment/Finance.

Why You Should Attend
- Trustees play an important role in addressing the health and retirement needs of plan members.
- They need to be confident and competent in that role.
- Attain a level of knowledge about trust operations, including health and welfare and pension plan structure and operations.
- Address the increasing general concerns of regulators and other stakeholders about the significance of health and welfare and pension trust management.

Who Should Attend
- Newly appointed and elected multi-employer, public sector and corporate plan trustees of any type of trust
- Members of pension advisory or benefit committees
- Benefit office staff
- Individuals returning to trustee service after an extended absence
- Potential trustees (as part of succession planning)
- Providers of service to trust fund plans

“"I think that the certificate programs are very educational and have helped me out when I have to make decisions concerning trusts.”

Robert Dillon, Trustee, International Brotherhood of Electrical Workers Local 1620, St. Johns, Newfoundland

To earn the FTMS Certificate of Achievement, attendees must attend all sessions and pass an online, open-book test. Visit www.ifebp.org/FAMbrochure for more information.
Visit www.ifebp.org/ftms for more information regarding the FTMS course and online testing.
Advanced Trust Management Standards (ATMS) helps trustees build upon their past education and practical experience by focusing on applying the knowledge gained to future decisions through engaging instruction and interactive case studies.

**Course Objective**
- **Applying** and **analyzing** the four key knowledge areas of effective trust management
- Adding breadth and depth to what is learned in FTMS
- Strengthening the pension and health and welfare application

**Who Should Attend**
- ATMS is the next step for those who have earned an FTMS Certificate of Achievement.
- Recommended for advanced-level appointed and elected multi-employer, public sector and corporate plan trustees/fiduciaries of any type of trust
- Members of pension advisory or benefit committees
- Benefit office staff

**Why You Should Attend**
The continuing development of trustees’ knowledge, confidence and competence is crucial as they grow into their roles.

“Great training and mentoring of ideas that have helped me enormously.”

*Allen Carpenter, Pension Trustee, Coldstream, British Columbia*

To earn the ATMS Certificate of Achievement, attendees must complete Session A and Session B, which includes attending all sessions and completing an online, open-book test for each session. Visit www.ifebp.org/FAMbrochure for more information.
SESSION A OR SESSION B

SESSION A PROGRAM SCHEDULE

Continental breakfast served 7:00-8:00 a.m.

Friday, August 14
8:00 a.m.-4:30 p.m.

Introduction
8:00-8:10 a.m.

Legal
8:10 a.m.-12:00 noon

Lunch Break
12:00 noon-1:00 p.m.

Legal
1:00-2:45 p.m.

Administration
3:00-4:30 p.m.

Saturday, August 15
8:00 a.m.-4:30 p.m.

Administration (continued)
8:00-11:30 a.m.

Lunch Break
11:30 a.m.-12:30 p.m.

Concurrent Case Studies
12:30-4:30 p.m.
• Health and Welfare
• Pension

(Participants will select one.)

SESSION B PROGRAM SCHEDULE

Continental breakfast served 7:00-8:00 a.m.

Friday, August 14
8:00 a.m.-4:30 p.m.

Introduction
8:00-8:10 a.m.

Funding/Investment/Finance: Part 1
8:10-11:30 a.m.

Lunch Break
11:30 a.m.-12:30 p.m.

Funding/Investment/Finance: Part 2
12:30-4:30 p.m.

Saturday, August 15
8:00 a.m.-4:30 p.m.

Funding/Investment/Finance: Part 3
8:00 a.m.-12:00 noon

Lunch Break
12:00 noon-1:00 p.m.

Concurrent Case Studies
1:00-4:30 p.m.
• Health and Welfare
• Pension

(Participants will select one.)

Visit www.ifebp.org/atms for more information regarding the ATMS course and online testing.
The Master of Trust Management Standards (MTMS) is a new credential program for trustees that builds upon the key knowledge areas in FTMS and ATMS, a next step that challenges trustees to take a leadership role in their funds and update their skill set.

**Course Objective**
- Prepare longer term trustees/fiduciaries to contribute in a leadership capacity to effective board management and to fulfill the board’s oversight role.
- Foster evaluation and creation of new points of view and behavioural change in the areas of Leadership, Governance, Oversight, Strategic Planning and Risk Management.
- Create an integrated learning experience delivered by a team of industry experts and experienced trustees and directors who emphasize processes and activities that reinforce how these areas are linked together.

**Why You Should Attend**
- Longer term trustees/fiduciaries play an important role mentoring new board members and stewarding succession planning.
- Using highly interactive exercises and solving complex problems, culminating in a mock board meeting, MTMS prepares you to leverage your own unique leadership skills to optimize your contribution and to engage and develop others—all with the aim of strengthening your plan or trust for the long-term benefit of your members.

**Who Should Attend**
- MTMS is the next step for those who have earned the ATMS Certificate of Achievement.
- Recommended for advanced-level appointed and elected multi-employer, public sector and corporate plan trustees/fiduciaries of any type of trust
- Members of pension advisory or benefit committees

“Essential to acquire the fundamental knowledge and advanced skills in order to meet your obligations and responsibilities in plan administration.”

Andrew Malinowski, Director, SaskTel Pension Plan, Yorkton, Saskatchewan

Both Session A and Session B require extensive pre-reading, pre-tests and post-tests.
SESSION A OR SESSION B

SESSION A PROGRAM SCHEDULE

Continental breakfast served 7:00-8:00 a.m.

Friday, August 14
8:00 a.m.-4:30 p.m.
Leadership
8:00 a.m.-12:00 noon
Lunch Break
12:00 noon-1:00 p.m.
Governance
1:00-4:30 p.m.

Saturday, August 15
8:00 a.m.-4:00 p.m.
Oversight
8:00 a.m.-12:00 noon
Lunch Break
12:00 noon-1:00 p.m.
Q&A Panel
1:00-1:30 p.m.
Board Self-Evaluation and Debrief
1:30-2:00 p.m.
Capstone Mock Board
2:00-3:30 p.m.
Take Away—Key Learnings
3:30-4:00 p.m.

SESSION B PROGRAM SCHEDULE

Continental breakfast served 7:00-8:00 a.m.

Friday, August 14
8:00 a.m.-4:30 p.m.
Leadership
8:00 a.m.-12:00 noon
Lunch Break
12:00 noon-1:00 p.m.
Strategic Planning
1:00-4:30 p.m.

Saturday, August 15
8:00 a.m.-4:00 p.m.
Risk Management
8:00 a.m.-12:00 noon
Lunch Break
12:00 noon-1:00 p.m.
Q&A Panel
1:00-1:30 p.m.
Board Self-Evaluation and Debrief
1:30-2:00 p.m.
Capstone Mock Board
2:00-3:30 p.m.
Take Away—Key Learnings
3:30-4:00 p.m.
ON-SITE BENEFITS INFORMATION EXPERT

A benefits information expert will be on hand to show you the many valuable resources available on the International Foundation website and to take your pensions and benefits information requests. Foundation staff will research and respond to your in-depth questions within two business days.

HEALTH FAIR

Attend the complimentary health fair at the Annual Conference and experience health and wellness as it is promoted through interactive opportunities for both you and your family.

Follow the Annual Conference on Twitter, and learn about keynote speakers, session details, special announcements, preconference offerings, additional education opportunities and more. #IFCanAC

“The Annual Conference will help you review what you are doing now with the goal to improve it. It will open your eyes to new issues coming at you.”

Greg Waddell
Management Trustee
International Brotherhood of Electrical Workers
Local 625
Bedford, Nova Scotia
Cancellation policies—Cancel and transfer fees are based on registration fee paid: 60+ days before meeting is 10%; 31-59 days before meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations/transfers received within three days (five days for Disney properties) of arrival. Registration fee is forfeited once program commences. For details and the 2019 policy, see www.ifebp.org/policies.

Hotel Map

1. Cambridge Suites Hotel Halifax
   C$179 single/double (studio)
   C$211 single/double (one-bedroom suite)

2. The Barrington Hotel
   C$229 single/double

3. Hotel Halifax
   C$229 single/double

4. Four Points by Sheraton Halifax
   C$208 single/double

5. Halifax Marriott Harbourfront Hotel
   C$262 single/double

6. Hampton Inn by Hilton Halifax Downtown
   C$212 single/double (studio)

7. The Prince George Hotel
   C$229 single/double

Shuttle service will be provided to all hotels except Cambridge Suites Hotel Halifax and The Prince George Hotel as they are in walking distance to the Halifax Convention Centre.

TOP ATTRACTIONS

- Halifax Public Gardens
- Art Gallery of Nova Scotia
- Halifax waterfront
- Halifax Citadel National Historic Site
- Maritime Museum of the Atlantic
Be a part of the country’s most respected EMPLOYEE BENEFITS CONFERENCE!

Show your support for the International Foundation educational mission and gain valuable recognition for your organization by becoming a sponsor of the Annual Conference. **Work smarter and harness the power of face-to-face marketing** when you network with **over 1,100 employee benefit influencers and decision makers all gathered in one place at one time.**

This is your opportunity to learn about the issues of greatest concern to them, answer their questions and be a resource. You’ll make valuable connections that can grow your business!

**Sponsors are recognized before, during and after the conference,** giving you maximum value for your dollar. You’ll receive recognition on our website, in on-site signage, in program materials, with sponsor ribbons on name badges and more.

**Current Sponsors**

- **ECKLER**
- **FENGATE**
- **Invesco**

For **more information** on how you can join these industry leaders that support the International Foundation education mission, please contact Diane Mahler at dianem@ifebp.org or 262-373-7656.
| Attendee Information (Please print clearly) |  
|-------------------------------------------|---|
| Individual ID# or CEBS® ID#              |  
| Full first name                          | M.I.  |
| Employer                                 | Title  |
| Address                                  |  
| City                                     | State/Province |
| Phone                                    |  
| Email                                    |  
| Form completed by                        | Phone |

| Registration Information                  |  
|-------------------------------------------|---|
| Bill to organization name                | Bill to organization ID #  |
| Badge name                               | Badge title  |
| Special assistance—specify                |  
| Special dietary requirements—specify     |  

<table>
<thead>
<tr>
<th>53rd Annual Canadian Employee Benefits Conference</th>
<th>August 16-19, 2020</th>
<th>Halifax Convention Centre</th>
<th>Halifax, NS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference Fee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Will you attend the French sessions?</td>
<td>Yes □ No □ (25-20F5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sunday-Wednesday, August 16-19</td>
<td>Until July 6, 2020</td>
<td>Member □ Nonmember □</td>
<td>After July 6, 2020</td>
</tr>
<tr>
<td>Preconference Registration Fee—Saturday, August 15-16, 2020</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Saturday, August 15 Session #PC01 Health, Wealth and Happiness—Part One</td>
<td>□ CS 560 □ CS 670 □ CS 710 □ CS 820</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PC11 Spouse/Guest Financial Planning (personal cheque/credit card) Name:</td>
<td></td>
<td></td>
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<tr>
<td>Sunday, August 16 Session #PC02 Health, Wealth and Happiness—Part Two</td>
<td>□ CS 560 □ CS 670 □ CS 710 □ CS 820</td>
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<td></td>
</tr>
<tr>
<td>PC12 Spouse/Guest Preretirement (personal cheque/credit card) Name:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*FTMS® (Foundations of Trust Management Standards)—Friday-Saturday, August 14-15 (25-20F1/EL175)</td>
<td>□ CS1,795 □ CS2,015 □ CS2,095 □ CS2,315</td>
<td></td>
<td></td>
</tr>
<tr>
<td>*ATMS™ (Advanced Trust Management Standards)</td>
<td>Must meet eligibility requirements.</td>
<td></td>
<td></td>
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<tr>
<td>Friday-Saturday, August 14-15 Session A □ (25-2091/EL171)</td>
<td>□ CS1,795 □ CS2,015 □ CS2,095 □ CS2,315</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Session B □ (25-2098/EL172)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>*MTMS (Master of Trust Management Standards)</td>
<td>(for graduates of ATMS) Must meet eligibility requirements.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[14:00] Friday-Saturday, August 14-15 Session A □ (25-20M1/EL173)</td>
<td>□ CS1,895 □ CS2,115 □ CS2,195 □ CS2,415</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Session B □ (25-20M2/EL174)</td>
<td></td>
<td></td>
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<tr>
<td>*Designing Curriculum to Close the Skills Gap—Friday-Saturday, August 14-16 (25-2029)</td>
<td>□ CS1,990 □ CS2,320 □ CS2,290 □ CS2,620</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*IMPORTANT NOTE: Course materials are sent via email. Please provide participant’s email address in attendee information section.

| Hotel                                      |  
|--------------------------------------------|---|
| Reservations confirmed on a first-come, first-served basis. Best available will be assigned. |  
| # of Adults □ # of Children □ Arrival date □ Departure date □ □ King bed □ Two beds |  
| 1st choice □ 2nd choice □ 3rd choice □ 4th choice | Special requests |

| Continuing Education Credit                |  
|-------------------------------------------|---|
| The International Foundation will apply for CE credit based on requests indicated below. |  
| □ Insurance agent □ Lawyer □ Other, specify | License #  
| Licensed in the province of |  
| NOTE: Requests made for CE credit on this form do not guarantee administration of credit. |  

| Payment Must Accompany Order              |  
|-------------------------------------------|---|
| Cancellation fees apply. See www.ifebp.org/policies. |  
| Make cheque payable to International Foundation. |  
| □ Exempt from tax. For meetings held in Canada, attach exemption certificate. |  
| □ Cheque # □ Credit card # □ Exp. date | Cardholder’s name (print) |

| Registration/Order Summary                 |  
|-------------------------------------------|---|
| Conference fee C$ | Preconference/FTMS/ATMS/MTMS fee C$ |
| Preconference/FTMS/ATMS/MTMS fee C$ | HST 15% C$ |
| Hotel deposit (C$400) C$ | Membership fee C$ |
| Membership fee C$ | Total (Canadian funds) C$ |

www.ifebp.org  
Secure fax (262) 364-1818  
International Foundation  
P.O. Box 2406, Station A, Toronto, ON M5W 2K6  
Questions? Email edreg@ifebp.org, or phone (844) 809-2698.
Register by July 6 and save C$300 with the early registration discount.

www.ifebp.org/canannual

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- **DELVE DEEPER** into areas of benefits that interest you the most.
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- **FOCUS** your education on topics you need to serve your funds.
- **EXHIBIT DEDICATION** to the members you serve.

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