Attend one or both programs in Whistler. Save C$375 when you register for both!
Canadian Public Sector Pensions and Benefits Conference

September 18-19, 2019
Fairmont Chateau Whistler | Whistler, British Columbia

PROGRAM AT A GLANCE

WEDNESDAY, SEPTEMBER 18

8:00-9:00 a.m.  Trade War . . . and Peace: A Global Economic Outlook
9:15-10:15 a.m.  Investing in a Time of Climate Change
10:30-11:30 a.m.  Are Financial Markets in a Bubble?
12:45-1:45 p.m.  Strategic External Risk Management
2:00-3:00 p.m.  Managing Internal Risks Through Stakeholder Engagement and Education
3:15-4:15 p.m.  Member Communications—The Law and How It Applies to Evolving Communication Practices

THURSDAY, SEPTEMBER 19

8:00-9:00 a.m.  Survey Says…
9:15-10:00 a.m.  Public Sector Accounting Changes—A PSAB Update
10:15-11:15 a.m.  Pension Innovation
11:30 a.m.-12:15 p.m.  ELHT Funding and Governance Challenges—Emerging Issues
12:45-1:45 p.m.  Luncheon With Keynote Speaker—Defending the Value of DB
2:00-3:00 p.m.  Implementing Pharmacogenomics in Benefits Plans: A Real-Life Case Study
3:15-4:15 p.m.  Past, Present and Future of Drug Plans in Canada

REGISTER TODAY TO SAVE C$300! Please use source code 1967B when registering. (Pricing valid through August 4. Includes C$300 savings.)

SAVE AN ADDITIONAL C$375 when you register for both the Canadian Public Sector Pensions and Benefits Conference and the Canadian Investment Institute. Use discount code Public19 to save.
Keep your plan strong by attending this two-day conference covering challenges faced by you and your peers in the public sector. Get information on current hot topics like pharmacogenomics, risk management, effective governance techniques and more, all affecting the sustainability of your plan. Walk away with solutions, strategies and best practices. Plus, you will have an opportunity to network with industry experts and peers.

The Canadian Public Sector Pensions and Benefits Conference provides a unique venue to learn firsthand from industry experts who will address the latest issues facing public sector plans today. The program focuses on plan design, pension innovation and ELHTs, and communication strategies for both pensions and benefits. Don't miss this opportunity to learn alongside your peers who face similar challenges.

**Benefits of Attending**
- Learn from leading pensions and benefits experts about the specific issues you face in your role.
- Experience education with a forum of your peers, and discover best practices in other plans.
- Hear about strategies that could save your fund money in the short and long term.
- Network with peers and other professionals.
- Registration includes two continental breakfasts, two luncheons, and a welcome reception and dinner at the Fairmont Chateau Whistler.

**Who Should Attend?**
This program is designed for trustees, administrators, professional advisors, and others in the Canadian public sector and broader public sector, including federal, provincial, municipal, education, university and college, health and community service sectors, and not-for-profit organizations.

**Accompanying Educational Program**
Canadian Investment Institute, September 15-18, 2019

**ATMS Session A or Session B Available**
Offered Saturday, September 14 to Sunday, September 15
See pages 20-21 for further details.
Canadian Public Sector Pensions and Benefits Conference
September 18-19, 2019 | Fairmont Chateau Whistler

WEDNESDAY, SEPTEMBER 18

7:00-11:30 a.m.
Registration and Information

7:00-8:00 a.m.
Continental Breakfast

8:00-9:00 a.m.
Trade War . . . and Peace: A Global Economic Outlook*

Where is the global economy going, given the current, unprecedented political and economic uncertainty? The U.S. economy has cooled following the mix of a government gridlock, market volatility and a variety of trade tensions, but at a time when the job market is still very strong. In the meantime, much of the rest of the world is also slowing after a strong run, partly owing to trade and political uncertainty. Canada’s economy has also calmed, putting the Bank of Canada on ice after a series of interest rate increases. Against this backdrop, what are the implications for the housing market and the broader economic outlook, as well as for financial markets? Douglas Porter will address these topics and more in his global economic and financial update.

Speaker
Douglas Porter, CFA, Chief Economist and Managing Director, BMO Financial Group, Toronto, Ontario

9:15-10:15 a.m.
Investing in a Time of Climate Change*

Institutional investors typically have multi-decade time horizons with portfolio exposure across the global economy. The implications of climate change are systemic and are already apparent in extreme weather events around the globe. Investors need to consider both climate-related mitigation and adaptation in an active way to develop climate resilience in their portfolios. This session will:

- Review the latest research on the investment impacts of climate change
- Illustrate the influential climate-related drivers on investment performance over both the short and the long term
- Identify a range of steps that investors can take to position portfolios for future resilience.

Speaker
Karen Lockridge, Principal, Mercer, Toronto, Ontario

*Held in conjunction with the Canadian Investment Institute

Visit www.ifebp.org/canadape for updates.
WEDNESDAY, SEPTEMBER 18 (CONT.)

10:30-11:30 a.m.
Are Financial Markets in a Bubble?*
Investors have been enjoying one of the longest economic expansions in history, but when and how might the party end? What might the next crisis look like, and does history give us any clues? This session will review:

- Human euphoria—Are we learning our lessons?
- How do economies and markets falter?
- What are the warning signs of a slowdown?
- Detailed forecasting—Friend or foe?
- What can or should you do to position your portfolio ahead of time?

Speaker
Marc Williams, CFA, FCIA, FIA, Vice President, Portfolio Manager, Leith Wheeler Investment Counsel Ltd., Vancouver, British Columbia

11:30 a.m.-12:45 p.m.
Luncheon

12:45-1:45 p.m.
Strategic External Risk Management
Hear about how the Local Authorities Pension Plan (LAPP) anticipates and manages external risks.
- Legislative change
- Investment environment
- Governance oversight
- Public perceptions

Speaker
Christopher A. Brown, Chief Executive Officer and President, LAPP Corporation, Edmonton, Alberta

2:00-3:00 p.m.
Managing Internal Risks Through Stakeholder Engagement and Education
Hear an insider’s view about the decision-making process and risk mitigation of one of Canada’s largest defined benefit pension plans, the Healthcare of Ontario Pension Plan (HOOPP). This session highlights key internal considerations at HOOPP leading to decisions that improve retirement security for its members. Learn about how HOOPP communicated these changes to various stakeholder groups, managing its risk through stakeholder engagement and education.

Speaker
Darryl Mabini, Assistant Vice President, Growth & Stakeholder Relations, Healthcare of Ontario Pension Plan (HOOPP), Toronto, Ontario

*Held in conjunction with the Canadian Investment Institute
Wednesday, September 18 (cont.)

3:15-4:15 p.m.
Member Communications—The Law and How It Applies to Evolving Communication Practices
This session will first examine the legal requirements regarding member communications and key lessons from communications case law. Next, newer communication methods, such as social media and websites, will be discussed in the context of the law. Finally, this session will set out some best practices in member communications.

- Communication legal requirements
- Lessons from communications case law
- Impact of new communication methods
- Communications best practices

Speaker
Jana R. Steele, LL.B., Partner, Osler, Hoskin and Harcourt, Toronto, Ontario

5:30-7:00 p.m.
Welcome Reception and Dinner

Thursday, September 19

7:00-8:00 a.m.
Continental Breakfast

8:00-9:00 a.m.
Keynote Presentation: Survey Says . . .
Take a whirlwind tour of the latest research about retirement savings from one of Canada's leading pension experts. You'll learn the facts and the “alternative facts” in what is sure to be an engaging and entertaining opening session. Come prepared to be surprised as Mr. Dobson samples results from sometimes thought-provoking and sometimes frivolous research.

Speaker
Derek W. Dobson, Chief Executive Officer and Plan Manager, Colleges of Applied Arts and Technology Pension Plan, Toronto, Ontario

“A great opportunity to hear about leading-edge issues and network with peers”

Victoria Grabb
Consultant
Special Forces Pension Plan
Co-Chair, International Foundation of Employee Benefit Plans
Canadian Legal/Legislative and Public Sector Committee
9:15-10:00 a.m.
Public Sector Pension Accounting Changes—A PSAB Update
How public sector employers report their pension obligations and costs may be changing. The Public Sector Accounting Board (PSAB), which sets accounting standards for governments and other public sector entities, has an employment benefits project underway that may result in changes in pension accounting. PSAB has issued three invitations to seek stakeholder feedback on the potential changes. Hear about the following:

• Why an update of the pension accounting standard is needed
• What the potential changes and their implications are
• How your organization can influence the future of pension accounting.

**Speaker**
Lydia So, M.B.A., CPA, CA, Principal, Public Sector Accounting Board, Toronto, Ontario

10:15-11:15 a.m.
Pension Innovation
Employers and labour groups are looking for innovative approaches to provide pensions. Employers are seeking ways to address funding and accounting issues and labour groups to maintain defined benefit arrangements. This session will present the current options available to address needs of both employers and labour groups.

**Speaker**
D. Cameron Hunter, FCIA, Partner, Eckler Ltd., Toronto, Ontario

11:30 a.m.-12:15 p.m.
ELHT Funding and Governance Challenges—Emerging Issues

• Governance structures for ELHTs—Funding governance, collective bargaining and alternative insurance arrangements
• Human rights concerns vis-à-vis plan design

**Speaker**
Murray Gold, Senior Partner, Koskie Minsky, LLP, Toronto, Ontario

12:15-2:00 p.m.
Luncheon

12:45-1:45 p.m.
Luncheon With Keynote Speaker—Defending the Value of DB
Some would argue that a DB plan is expensive. But not having one can be more costly in terms of less control of your labour force, higher job stress, more employee health issues, lower productivity, and higher costs for taxpayer-supported systems like OAS and GIS. In his keynote address, Dr. Robert Brown makes the case for DB pension plans and their value to the Canadian economy and labour force.

**Speaker**
Robert Brown, Ph.D., ACAS, FCIA, FSA, Consultant, Victoria, British Columbia
THURSDAY, SEPTEMBER 19 (CONT.)

2:00-3:00 p.m.
Implementing Pharmacogenomics in Benefits Plans: A Real-Life Case Study
Hear how and why the Halifax Professional Fire Fighters Benefits Trust implemented pharmacogenomics testing for its plan members.

- Obtain a better understanding of the testing process and expected outcomes.
- Get a pharmacist’s perspective on the real-world advantages and potential issues with the testing, and learn how a unified treatment approach can help deliver better patient outcomes.

Co-Speakers:
Chris A. Camp, GBA, Chair, Halifax Professional Fire Fighters Benefits Trust,
Halifax, Nova Scotia
Leanne MacFarlane, B.Sc., Pharm., Ph.C., Director Advocacy and Preferred Pharmacy Network, Sobeys National Pharmacy Group, Stellarton, Nova Scotia

3:15-4:15 p.m.
Past, Present and Future of Drug Plans in Canada
During this session, Barbara Martinez will investigate the drivers that lead to drug cost increases and decreases in prescription drug plans. She will deliver trends in drug spending and provide an outlook for the future. National Pharmacare will also be discussed, providing an understanding of the different models and methods that are being considered.

Speaker
Barbara A. Martinez, Practice Leader, Drug Benefits Solutions, Great West Life,
Toronto, Ontario

Sponsorship Opportunities
Show your support for the International Foundation educational mission and gain valuable brand exposure for your organization by becoming a sponsor of the Canadian Public Sector Pensions and Benefits Conference. As a sponsor, you will network and grow your business with trustees, administrators and professional advisors who are making decisions for their group benefit plans in Canada’s public and broader public sectors. Sponsorships include many value-added rewards.

Interested in learning more?
Contact Diane Mahler today! dianem@ifebp.org | (262) 373-7656
WELCOME RECEPTION AND DINNER
Wednesday, September 18, 5:30-7:00 p.m.

☐ I will not attend the reception and dinner.

☐ I will attend (complimentary).

☐ I will attend and bring a guest. Guest fee ☐ $75 (MTG Guest 1867)
(Paid by personal cheque/credit card)

Customer Information (Please print clearly.)
First name ____________________________  M.I. _____________________________  
Last name ________________________________________________________________

Guest Information (Please print clearly.)
First name ____________________________  M.I. _____________________________  
Last name ________________________________________________________________

RSVP by Monday, September 9, 2019.

Payment Information (Please print clearly.)
Full payment in Canadian funds must accompany order. Make cheque payable to International Foundation.

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Fax your registration with credit card number: (262) 364-1818

Mail the registration form with cheque or credit card number to: International Foundation–Conference, P.O. Box 2406, Station A., Toronto, ON M5W 2K6

For registration information, email edreg@ifebp.org, or phone (905) 361-2822 or toll-free (844) 809-2698.

INCLUDED WITH YOUR REGISTRATION
• All conference program meals are included in the registration fee.
## PROGRAM AT A GLANCE

### Sunday, September 15

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<td>Are Financial Markets in a Bubble?</td>
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Overseeing your plan assets and making prudent decisions are two of the most important duties you face as a plan fiduciary. The Canadian Investment Institute is for trustees who have a firm grasp of investment concepts and principles.

The Canadian Investment Institute features global and Canadian economic updates that will help keep you current on recent activities and trends. Sessions will build your skills in portfolio oversight and provide timely information about the issues impacting the funds and participants you represent.

**Who Should Attend**

Because sessions are at an intermediate to advanced level, we recommend registrants have at least three years of investment education/experience.

- Experienced labour and management trustees
- Public sector trustees
- Administrators
- Other professionals who have mastered basic investment principles

**Benefits of Attending**

- Learn from leading-edge investment and economic professionals across North America.
- Choose from a unique mix of investment workshops that provide enhanced opportunities for interaction with speakers.
- Hear what other funds are doing and why.
- Registration includes three continental breakfasts, two luncheons and a welcome reception.

**Accompanying Educational Program**

ATMS Session A or Session B—September 14-15, 2019

Canadian Public Sector Pensions and Benefits Conference—September 18-19, 2019
SUNDAY, SEPTEMBER 15

12:00 noon-6:00 p.m.
Registration and Information

5:00-6:00 p.m.
Trade Wars and China
Trade wars and China have been a major focus in the Canadian news for well over a year. This talk will discuss the most recent events and focus on:

• How Donald Trump has shaken up the world trading regime
• Trade relations between Canada, the United States, and China and Mexico
• Where relations are headed in the next year
• Can the healthy economy secure Trump a second term as president?

Speaker

6:00-7:00 p.m.
Welcome Reception (Guests Invited)
Refreshments and light hors d’oeuvres will be served.

MONDAY, SEPTEMBER 16

7:00 a.m.-4:00 p.m.
Registration and Information

7:00-7:45 a.m.
Continental Breakfast

7:45-8:00 a.m.
Opening Remarks and Annual Investment Sentiment Survey

8:00-9:00 a.m.
Canadian Oil and Pipeline Outlook
In recent years, Canada’s focus on being a leading environmental citizen has come into apparent conflict with our desire to responsibly provide clean, affordable energy for a growing world that demands a higher standard of living for all. This talk will discuss the (at times) uncomfortable reality of energy and the environment in Canada and around the world. Canada’s unique combination of resources, policy and technology position our nation to be a leader in the future energy landscape, if we have the courage to stand up for our industry and best-in-class way of doing things.

Speaker
Chris Slubicki, President and Chief Executive Officer, Modern Resources, Calgary, Alberta
MONDAY, SEPTEMBER 16 (CONT.)

9:15-10:15 a.m.
The Shifting of Demographics in Investing

Over the next ten years, we will be witnessing two major demographic changes. The Baby Boomers, who have been in their peak saving years, will be retiring, while the Millennials, a larger cohort than the Baby Boomers, will hit their peak spending years.

- How could this affect the balance between supply and demand of capital?
- How could this affect wages going forward, and what is its potential impact on inflation?
- How could this affect the different asset classes?

Speaker
Sébastien Rheaume, Managing Director, AlphaFixe Capital Inc., Montreal, Quebec

10:30-11:30 a.m.
Bonds or Equity? Interest Rate Risk or Not?

Bonds are an asset class usually seen as a part of our fixed-income universe, but when we look at empirical data (not knowing they are bonds), we would classify them as a very low volatility equity strategy. When you look at them from this angle, they become much more interesting for a pension plan portfolio. Still, contractually, they are bonds and therefore have a well-defined duration. Does a well-defined duration mean interest rate risk?
Not necessarily.

Speaker
Mario Lavallée, Ph.D., CFA, Professor of Finance, University of Sherbrooke, Montreal, Quebec

“A great conference to attend and get some insight about the trendy investment topics

Julia (Jingyi) Qiu
Management Employee Pension Board
Alberta Pensions Services Corporation

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MONDAY, SEPTEMBER 16 (CONT.)

11:30 a.m.-1:00 p.m.
Luncheon

1:00-2:00 p.m.
Grinding Out Yield in a Low Yield Environment—Bond Overlays and Other Enhancement Ideas

Even though short term rates are on the rise, pension plans still face an historically low yield environment. In this session we will explore:

- Mechanics of a bond overlay program
- Minimizing the mismatch between plan assets and liabilities
- Alpha sources to use within the bond overlay program
- Other yield enhancement ideas.

Speaker
Adam Rennison, CFA, FCIA, FSA, Partner, PBI Actuarial Consultants Ltd., Vancouver, British Columbia

2:15-3:00 p.m. and 3:15-4:00 p.m.
Concurrent Followup Workshops

A. The Shifting of Demographics in Investing
   Workshop Leader: Sébastien Rheume, Managing Director, AlphaFixe Capital Inc., Montreal, Quebec

B. Bonds or Equity? Interest Rate Risk or Not?
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7:00 a.m.-4:00 p.m.
Registration and Information

7:00-8:00 a.m.
Continental Breakfast

8:00-9:00 a.m.
Brexit and Beyond: Who’s Next?
Populism as a mainstream political ideology has swept across the globe in the past several years. Underpinning populism are disaffected voters who have faced the negative consequences of globalization, including increasing income inequality and loss of manufacturing jobs. Populist agendas want to reverse this trend through increased protectionism, which is playing out through trade wars and reduced immigration. Populist policies will likely lead to an economy flanked by higher inflation, declining productivity and lower growth. Is populism here to stay? If so, which countries are most vulnerable?

Speaker
Kathleen Pabla, CFA, Vice President, Segal Rogerscasey Canada, Toronto, Ontario

9:15-10:15 a.m.
The Appeal of Midmarket Infrastructure Investing
Infrastructure is an increasingly popular and investable asset class. Investors are recognizing the advantages of its inclusion in their traditional portfolios. Discover how investing in this private asset class provides benefits such as diversification and risk mitigation. For investors, there is no shortage of options to select from in terms of funds and managers. It is important to assess the infrastructure strategy and to select an appropriate strategy that complements the objectives of the portfolios. This session will cover:

- Infrastructure as a global asset class
- Different segments of the market: Large cap versus midmarket
- Subsectors within the infrastructure asset class
- Open-ended versus closed-ended
- Active asset management to secure and exceed returns expectations.

Speaker
Alina Osorio, P.Eng., M.B.A., CFA, President, Fiera Infrastructure, Toronto, Ontario
TUESDAY, SEPTEMBER 17 (CONT.)

10:30-11:30 a.m.
Building Real Returns With Real Assets
Real estate has created vast sums of wealth for long-term investors over time. What opportunities arise at this point in the cycle for liquid and illiquid real estate investments? What challenges exist as the category becomes institutionalized? What risks does the changing interest rate environment bring?

Speaker
Derek Warren, Portfolio Manager, Lincluden Investment Management, Mississauga, Ontario

11:30 a.m.-1:00 p.m.
Luncheon

1:00-2:00 p.m.
Artificial Intelligence’s Promise to Investors: Fad or Reality?
The present technology tsunami brings opportunities, but also challenges, for the pension fund trustee. How will this revolution realistically impact the decision-making process? How are the role and responsibility of the trustee evolving in a data-driven world? How can one get up to speed and increase one’s artificial intelligence literacy? What crucial questions and decisions need to hit the board’s agenda?

Speaker
Estelle Métayer, Principal/Founder, Competia, Adjunct Professor, McGill University, Montreal, Quebec

2:15-3:00 p.m. and 3:15-4:00 p.m.
Concurrent Followup Workshops

A. The Appeal of Midmarket Infrastructure Investing
   Workshop Leader: Alina Osorio, P.Eng., M.B.A., CFA, President, Fiera Infrastructure, Toronto, Ontario

B. Building Real Returns With Real Assets
   Workshop Leader: Derek Warren, Portfolio Manager, Lincluden Investment Management, Mississauga, Ontario

Artificial Intelligence’s Promise to Investors: Fad or Reality?
   Workshop Leader: Estelle Métayer, Principal/Founder, Competia, Adjunct Professor, McGill University, Montreal, Quebec

Great detailed information and great conference
Ronda McCready
NB Nursing Home Pension Plan
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*Held in conjunction with the Canadian Public Sector Pensions and Benefits Conference

Visit www.ifebp.org/canadainvest for updates.
Are Financial Markets in a Bubble?*
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- How do economies and markets falter?
- What are the warning signs of a slowdown?
- Detailed forecasting—Friend or foe?
- What can or should you do to position your portfolio ahead of time?

**Speaker**
Marc Williams, CFA, FCIA, FIA, Vice President, Portfolio Manager, Leith Wheeler Investment Counsel Ltd., Vancouver, British Columbia

*Sponsored by the Canadian Public Sector Pensions and Benefits Conference

**Sponsorship Opportunities**
Increase your brand recognition among experienced pensions and benefits decision makers by sponsoring the Canadian Investment Institute. As a sponsor, you can network and share your knowledge with multi-employer and public sector trustees, administrators and professional advisors who are seeking resources on the investment issues impacting the funds and participants they represent.

Interested in learning more?
Contact Diane Mahler today! dianem@ifebp.org  |  (262) 373-7656
Hotel and Location Information
Fairmont Chateau Whistler | Whistler, British Columbia

Canadian Public Sector Pensions and Benefits Conference
September 18-19, 2019

Accompanying Educational Program
Canadian Investment Institute
September 15-18, 2019

Fairmont Chateau Whistler
Rate: C$304.00 single/double
Occupancy reservation deadline:
August 19, 2019

You will be charged a C$400 deposit upon registration. Please specify your hotel requirements on the registration form.

Note: Hotel room availability is not guaranteed outside of scheduled program dates.

Hotel Details
Fairmont Chateau Whistler combines elegance and a modern alpine setting, all nestled at the foot of Whistler Blackcomb, one of North America’s top ski resorts. The hotel offers a beautiful 18-hole mountain golf course as well as tailored guided tours of Whistler that explore the natural mountainside. Fairmont Chateau Whistler also features indoor and outdoor pools as well as a spa and resort. There are a variety of dining options, including The Chalet, which features alpine cuisine and fondue.

Location Details
Whistler is located north of Vancouver in British Columbia. Whistler Blackcomb, one of the largest ski resorts in North America, features skiing and snowboarding as well as spas, cafés and restaurants. Whistler is also home to many other beautiful natural sights, such as Garibaldi Provincial Park and Whistler Mountain, as well as the PEAK 2 PEAK Gondola. Whistler also has many fine-dining restaurants and luxury spas.
ATMS™ focuses on the application and analysis of the four key knowledge areas of effective trust management, adding breadth and depth to what is learned in Foundations of Trust Management Standards (FTMS®) and strengthening the pension and health and welfare applications. 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 materials consist of all on-site presentation materials, supplementary readings and additional information for future reference.

Who Should Attend
ATMS is the next step for those who have earned an FTMS Certificate of Achievement. It is also recommended for advanced-level appointed and elected multi-employer, public sector and corporate plan trustees of any type of trust as well as for benefit office staff. (See prerequisites section for more information.) ATMS is applicable for trustees of both pension and health and welfare trust funds.

Prerequisites
Before enrolling in ATMS, you must either:

- Complete the FTMS Certificate of Achievement, earned by completing the classroom work and passing the accompanying test

  OR

- Pass the ATMS Qualifying Test. Visit www.ifebp.org/atmsprereq for more information.

Session A and Session B Learning Format
The Session A and Session B learning format is sequential—Session A, including successful completion of the accompanying test, is a prerequisite for Session B. This format will require attendance at two separate locations.
Learning Objectives

The learning objectives for ATMS enforce the application and analysis of the four key knowledge areas for effective trust management.

By participating in **Session A** of the ATMS program, which focuses on the key knowledge areas of *Legal* and *Administration*, trustees should be able to:

- **Understand** sources of law applicable to trusts—Constitutional, legislative, common law
- **Identify** problems and issues when legal duties conflict
- **Understand** Pension Benefits Standards Act (PBSA) standards and their application to modern plan governance
- **Recognize** potential legal problems resulting from trustee decisions (cases)
- **Apply** modern governance principles and best practices to identify risks and propose actions to address those risks
- **Outline** the benefits of a sound risk management process
- **Identify** major risks trustees face in the current benefits environment and provide examples of indicators
- **Identify** models, best practices, tools and sources of data that help mitigate risks and contribute to a formal risk management plan/process
- **Apply** risk management analysis to gain insight into plan risks and identify actions to mitigate them
- **Explain** the significance of competencies and personal bias on an effective board process.

By participating in **Session B** of the ATMS program, which focuses on the key knowledge area of *Funding/Investment/Finance*, trustees should be able to:

- **Explain** the interrelationships among benefit design, funding and investment policy decision making and their role in effective management of all types of trusts/plans
- **Define** risks for plans and members in funding and investing policy development
- **Describe** the significance of governance to trustee decision making related to trust/plan funding, investment and finance
- **Identify** key sources of financial information that support decision making
- **Apply** relevant legislative requirements, modern governance and best practices to identify funding and investment issues and propose actions to address those issues.

**Governance**

Governance is a key knowledge area for effective management of trusts. While there is not a separate session devoted to the topic, governance considerations will be discussed throughout the ATMS curriculum.
CONTINUING EDUCATION CREDIT

Programs sponsored by the International Foundation of Employee Benefit Plans are consistently accepted for credit by agencies governing continuing education for license renewal and professional recertification. Please note that preapproval by the governing agency is sometimes necessary. Therefore, it is important to register at least 60 days prior to the program taking place.

Note: Requests made for continuing education credit do not guarantee administration of credit.

For further information on continuing education credit, please call (262) 786-6710, option 2.

Educational sessions at this program can qualify for CEBS Compliance credit. Visit www.cebs.org/compliance for additional information.

POLICIES

New cancellation policies effective for 2019 education programs.

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 3 days (5 days for Disney properties) of arrival. Registration fee is forfeited once program commences. For details on the 2019 policy, see www.ifebp.org/policies.

RELATED READING

Employee Benefits in Canada, Fourth Edition

Mark Zigler, D. Cameron Hunter, Murray Gold, Michael Mazzuca and Roberto Tomassini, editors

An introduction to and overview of public and private employee benefit plans in Canada. Both novice and seasoned professionals will find this a useful reference on the legal and administrative aspects of pension, health and other benefit programs. Topics include regulatory compliance, fiduciary responsibility, investment fundamentals, member communications, taxation and the handling of delinquencies in multi-employer plans.

(International Foundation)

615 pages. 2015. Item #7518.

C$208 (Members: C$163) Price includes shipping and handling.

To order, visit www.ifebp.org/EmployeeBenefitsinCanada.
REGISTRATION/2019

Canadian Investment Institute (15-1915)
Canadian Public Sector Pensions and Benefits Conference (15-1967)

Attendee Information (Please print clearly)

Individual ID# or CEBS® ID# ____________________________ Source code 19 67 W

Full first name ____________________________ M.I. ______ Last name ____________________________

Employer __________________________________________ Title ______________________________________

Address ____________________________________________ State/Province ______ Country ______ ZIP/Postal code ______

Phone ____________________________________________ Business ______ Home ______ Mobile ______

Email ____________________________________________ Form completed by __________________________

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Registration Information

Bill to organization name ____________________________

Bill to organization ID # ____________________________

Badge name ____________________________ Badge title ____________________________

Special assistance—specify ____________________________

Special dietary requirements—specify ____________________________

Attend Both Programs for One Low Price* Discount Code Public19

September 15-19, 2019 • Whistler, British Columbia Until August 4

Member fee ____________________________________________ C$2,800  C$3,400
Nonmember fee ____________________________________________ C$3,350  C$3,950

September 15-18, 2019 • Whistler, British Columbia After August 4

Member fee ____________________________________________ C$1,815  C$2,115
Nonmember fee ____________________________________________ C$2,145  C$2,445

ATMS™ (Advanced Trust Management Standards) • Saturday-Sunday, September 14-15, 2019

Session A 15-1984/EL151  Session B 15-1978/EL152

September 18-19, 2019 • (15-1967)

Member fee ____________________________________________ C$1,360  C$1,660
Nonmember fee ____________________________________________ C$1,580  C$1,880

Hotel

Reservation deadline: August 19, 2019. Include C$400 hotel deposit.

Fairmont Chateau Whistler C$304 single/double

# of Adults ________  # of Children ________  Arrival date ________  Departure date ________

- King bed  - Two beds  Special requests—describe ____________________________

Continuing Education Credit

The International Foundation will apply for CE credit based on requests indicated below.

Insurance agent  Lawyer  Other, specify ____________________________

Licensed in the province of ____________________________ License # ____________________________

NOTE: Requests made for CE credit on this form do not guarantee administration of credit.

Payment Must Accompany Order

NEW! Policies have changed. See www.ifebp.org/policies.

Make cheque payable to International Foundation.

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www.ifebp.org  Secure fax (262) 364-1818  International Foundation P.O. Box 2406, Station A, Toronto ON M5W2K6

Registration/Order Summary

Membership fee C$ ____________________________
Conference fee C$ ____________________________
ATMS™ fee(s) C$ ____________________________
Subtotal (taxable) C$ ____________________________
GST (5%) (subject to change) C$ ____________________________
Hotel deposit (C$400) C$ ____________________________
Total (Canadian funds) C$ ____________________________

CEBS Compliance—Visit www.cebs.org/compliance for additional information.

CEBS Compliance

- Visit www.cebs.org/compliance for additional information.

Questions, email edreg@ifebp.org, or phone (844) 809-2698.

8.6M-519
Register by August 4 to save with the early registration discount!

SAVE AN ADDITIONAL $375 when you register for both the Canadian Public Sector Pensions and Benefits Conference and the Canadian Investment Institute.

Visit www.ifebp.org/canadape to register, or call (905) 361-2822 or toll-free (844) 809-2698 for more information.

Session Titles
- Strategic External Risk Management
- Managing Internal Risks Through Stakeholder Engagement and Education
- Implementing Pharmacogenomics in Benefits Plans: A Real-Life Case Study