The Canadian Public Sector Pensions and Benefits Conference brings together leaders from around the country to tackle the unique challenges encountered by the public sector. Sessions offer innovative solutions to ensure the viability of pension and health and welfare funds as well as interaction with leaders of some of the largest plans in Canada.

Engaging sessions and open forums provide practical insight into the issues plans are facing. Attendees can ask questions, gather feedback from experts and learn from other attendees. Register for this two-day conference and explore plan design, governance and communication strategies for pensions and benefits.

Benefits of Attending

• Learn from leading pension and benefits professionals about the specific issues you face in your role.
• Experience learning from a forum of your peers and discover best practices in other systems.
• Hear about strategies that could save your fund money in the short and long term.
• Take advantage of several networking opportunities with peers and other professionals.

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.
## PROGRAM AT A GLANCE

### Tuesday, June 16, 2020

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<td>Market Context and Rising Complexity: Technology, Economy, Demography</td>
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<td>9:15-10:15 a.m.</td>
<td>A Look at Plan Benchmarking and Fees</td>
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<td>Considerations for Implementing Sustainable Finance Into Your Plans</td>
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<td>Financial Literacy for Plan Members</td>
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<td>Data Analytics—Using AI and Machine Learning</td>
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<td>The Efficiency and Value of Defined Benefit Pensions: The Latest Research</td>
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“This conference is the best value for public sector pension trustees, administrators, etc.”

Trina Hordal  
Employee Benefits Consultant  
City of Saskatoon

Register at (888) 334-3327 or www.ifebp.org/canadape
Tuesday, June 16, 2020

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

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

8:00-9:00 a.m.
Market Context and Rising Complexity: Technology, Economy, Demography

Canada’s pensions are at an inflection point, with significant technological, economic and demographic dynamics reshaping the industry. In an unprecedented macroeconomic and market environment, plans face important choices across asset allocations, a proliferation of data sources and newly developed operating models. Plan managers are exploring new approaches to their investments, operations and workforce management processes. How are Canadian pension plans positioning their organizations to face these challenges over the months and years ahead?

Speaker:
Steven R. Wolff, Chief Executive Officer, CIBC Mellon, Toronto, Ontario

9:15-10:15 a.m.
A Look at Plan Benchmarking and Fees

As boards diversify their investments using active and passive strategies, it is important that they think about the benchmarks used. This session will look at:

- How to benchmark against other plans
- Administrative and investment management fees
- Perception of benchmarks.

Speaker:
Michael Reid, FSA, FCIA, Vice President, CEM Benchmarking, Toronto, Ontario

10:30-11:30 a.m.
Considerations for Implementing Sustainable Finance Into Your Plans

ESG and RI investment strategies have become more popular in recent years. Asset owners and investment managers are considering and implementing a range of strategies that consider environmental, social and governance risks and opportunities.

Panelists:
Jennifer Coulson, ICD.D, Vice President, ESG, British Columbia Investment Management Corporation (BCI), Victoria, British Columbia

Christie Stephenson, Executive Director, Peter P. Dhillon Centre for Business Ethics, University of British Columbia, Sauder Business School, Vancouver, British Columbia
Tuesday, June 16, 2020  (Continued)

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

12:45-1:45 p.m.
Financial Literacy for Plan Members
Several studies have shown that providing financial planning to members of plans not only helps prepare them for retirement but also reduces stress and improves their overall health. This session will look at:

• What are plans providing for financial literacy?  
• What is working?  
• What are the outcomes?  
• Challenges to providing advice.

Panelists:
Cary List, FCPA, PFA, CFP, President and Chief Executive Officer, FP Canada, Toronto, Ontario
Peter Shena, Executive Vice President and Chief Pension Officer, Ontario Pension Board, Toronto, Ontario

2:00-3:00 p.m.
Data Analytics—Using AI and Machine Learning
Artificial intelligence (AI) and machine learning have worked their way into mainstream vocabulary. What are their impacts on group benefits and pensions, and how can plans capitalize on their potential? This session will look at:

• Who is currently using AI and machine learning?  
• Considerations when looking at implementing
• How data and technology are used to tailor member expenses  
• Lessons learned.

Speakers:
Michael Bradie, Director, Strategic Innovation, Green Shield Canada, Windsor, Ontario
Inka Skinner, Associate Vice President, Analytics, Sun Life Financial, Toronto, Ontario

3:15-4:15 p.m.
Best Practices for Member Communication
Pensions and benefits are complex topics that require strong communication plans to ensure members understand and use the benefits they have earned. This session will look at the best practices two plans are using to communicate information to their broad memberships.

Speakers:
Venessa Benson, Manager, Communications and Pension Reporting, LAPP Corporation, Edmonton, Alberta
Diane Miller, CHRL, Compensation, Benefits and HRIS Specialist, Electrical Safety Authority, Mississauga, Ontario
Tuesday, June 16, 2020  (Continued)

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

Wednesday, June 17, 2020

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

8:00-10:15 a.m.
A Dialogue With Canadian Public Sector Leadership
Join us in a conversation with Canadian public sector thought leaders as they discuss major issues such as:

- Board culture
- Diversity and inclusion
- Representative boards vs. professional boards.

Panelists:
Rod Matheson, Chief Executive Officer, Alberta Teachers’ Retirement Fund, Edmonton, Alberta
Alison McKay, Chief Executive Officer, Saskatchewan Healthcare Employees’ Pension Plan (SHEPP), Regina, Saskatchewan
Laura Nashman, Chief Executive Officer, B.C. Pension Corporation, Victoria, British Columbia

10:30-11:30 a.m.
Lessons Learned From U.S. Board Leaders
Learn from experienced U.S. board leaders as they discuss the successes and challenges they face in the public sector and how it can help boards in Canada. Topics to be discussed include:

- Diversity and inclusion
- Cybersecurity risk
- Open board meetings
- Plan member communication.

Panelists:
Dana Bilyeu, Executive Director, National Association of State Retirement Administration (NASRA), Portland, Oregon
Amy L. McDuffee, CEBS, Founder and Chief Executive Officer, Mosaic Governance Advisors, LLC, Westminster, Colorado

11:30 a.m.-12:30 p.m.
Lunch
Wednesday, June 17, 2020  (Continued)

12:30-1:30 p.m.  
**Cross-Border Open Forum**  
Take part in this highly interactive session where you can ask questions and have them answered by morning session panelists.

1:45-2:45 p.m.  
**Pension Communications**  
To ensure the success of the pension benefits you provide, a successful communication plan is key. Learn what the best practices are from around North America and Europe in this case study review from the World Pension Alliance.

*Speaker:*  
Randy G. DeFrehn, Coordinator, World Pension Alliance, Washington, D.C.

3:00-4:00 p.m.  
**The Efficiency and Value of Defined Benefit Pensions: The Latest Research**  
For those who work with or benefit from defined benefit pensions, you know that pensions are the most efficient and effective method to save for retirement. Unfortunately, too many Canadians are unfamiliar with pensions and are susceptible to the demagoguery, misinformation and pseudo-research employed to undermine pensions. This session will highlight the latest research and data on the efficiency of pensions, the economic stimulus pensions provide and the benefits they provide to employers, government revenues and pension beneficiaries.

*Speaker:*  
Hank H. Kim, Esq., Executive Director and Counsel, National Conference on Public Employee Retirement Systems (NCPERS), Washington, D.C.

“I attend this conference to learn different insight into all other pensions and risks.”  
Brenda Vienneau  
Chair  
CUPE 1252 New Brunswick Hospital Plan
Thursday, June 18-Friday, June 19, 2020

8:00 a.m.-4:30 p.m. daily

Foundations of Trust Management Standards (FTMS®) is the first step, focused on the needs of new trustees. FTMS is for those who must learn and understand basic principles of effective trust fund management as well as obtain an awareness of where to find the answers they need to make informed decisions.

Course Objective

The objective of FTMS is to 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. Trustees/fiduciaries will be able to highlight why these key knowledge areas are important and to identify sources of additional information. Course materials consist of all on-site presentation materials, supplementary readings and additional information for future reference.

Why You Should Attend

Trustees play an important role in addressing the health and retirement needs of plan members, and they need to be confident and competent in that role. FTMS recognizes that the trustee’s role requires a minimum level of knowledge about trust operations, including health and welfare and pension plan structure and operations. FTMS will also address the increasing general concerns of regulators and other stakeholders about the significance of health and welfare and pension trust management.

Who Should Attend

FTMS is recommended for newly appointed and elected multi-employer, public sector and corporate plan trustees of any type of trust; members of pension advisory or benefit committees; and benefit office staff. The program is also valuable for individuals returning to trustee service after an extended absence, potential trustees (as part of succession planning) and providers of service to trust fund plans.
Course Objective

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 FTMS and strengthening the pension and health and welfare application. Course materials consist of all on-site presentation materials, supplementary readings and additional information for future reference.

Why You Should Attend

Developing trustees’ confidence and competence is crucial as they grow into their roles. ATMS helps trustees build upon their past education and practical experience by focusing on applying the knowledge gained in FTMS to future decisions, through engaging instruction and interactive case studies.

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/fiduciaries of any type of trust; members of pension advisory or benefit committees; and benefit office staff. (See prerequisites section for more information.)

Prerequisites

Before enrolling in ATMS, you must:

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 on the ATMS Qualifying Test.
Course Objective
The objective of MTMS is to prepare longer term trustees/fiduciaries to contribute in a leadership capacity to effective board management and to fulfill the board’s oversight role. The MTMS program is highly interactive, focusing on evaluation and creation of new points of view and on behavioural change in the areas of leadership, governance, oversight, strategic planning and risk management. This integrated learning experience is delivered by a team of industry experts, experienced trustees and directors who emphasize processes and activities that reinforce how these areas are linked together. Course materials consist of preprogram readings; pretests; on-site presentation materials; and supplementary readings, sample documents and additional information for future reference. Both Session A and Session B include post-tests and capstone mock board meetings.

Why You Should Attend
Longer term trustees/fiduciaries play an important role mentoring new board members and stewarding succession planning. As they become leaders, they are charged with taking action to advance their plans or trusts, positioning them to successfully navigate challenges and capitalize on opportunities.

Using highly interactive exercises and solving complex problems, culminating in a mock board meeting, MTMS prepares you to leverage your own unique leadership strengths and 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.

The award of the MTMS credential is the culmination of your successful journey through the trustee/fiduciary education path! It recognizes the commitment involved in completing the suite of trustee education programs (FTMS, ATMS and MTMS). In total, these programs represent ten days of face-to-face education and multiple assessments including two capstone mock board meetings—fortified by your years of experience as a fiduciary/trustee.

Who Should Attend
MTMS is the next step for those who have earned the ATMS Certificate of Achievement. It is also 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; and benefit office staff.

Prerequisites
Before enrolling in MTMS, you must:

Complete the FTMS Certificate of Achievement or pass the ATMS Qualifying Test AND Complete the ATMS Certificate of Achievement.
Sponsorship Opportunities

Our unique approach to offering current, accurate and unbiased education and information is what draws attendees to our programs throughout the year. This impartiality is what sets the International Foundation apart from other organizations offering educational conferences.

Service providers bring a great value to these programs by providing our attendees with access to programs and tools that solve their problems, improve their efficiencies and add value to their benefit plan participants. In return, sponsors can use these more intimate settings to:

**Network With Attendees**
Sponsorships are one of the very few ways you can gain direct exposure and access to our exclusive audience. We do not distribute our attendee or member lists.

**Stand Out From the Competition**
Sponsor representatives register for our conferences and attend the educational sessions. Our members notice, appreciate and want to do business with those who want to learn about the industry and the issues they face.

**Obtain Quality Leads**
Our attendees are decision makers, so you always have access to the most qualified prospects.

**Gain Optimum Brand Exposure**
Sponsorships are designed to give your brand maximum exposure, with recognition on our website, in eye-catching on-site signage and program materials, with sponsor ribbons and more!

**Get Maximum Value for Your Dollar**
Sponsors are recognized before, during and even after the conference, giving you greater value for your dollar.

Make your marketing more efficient in 2020 by meeting with your target audience face-to-face, all gathered in one location.

Interested in learning more? Contact Diane Mahler today! dianem@ifebp.org | (262) 373-7656
Hotel Information

Hyatt Regency Vancouver
June 16-17, 2020 | Vancouver, British Columbia

The Hyatt Regency Vancouver is a contemporary hotel equipped with free Wi-Fi, 42-inch flat screen TV, iPod docks, mini fridge, coffee maker and workstation desks. Hotel amenities include outdoor heated pool, hot tub and access to 24-hour fitness room. Enjoy the Mosaic Grille Restaurant, Grain Tasking Bar and Starbucks Coffee during your visit.

The International Foundation has secured a room rate of C$359 single/double occupancy for attendees. You will be charged a C$450 deposit upon registration. Please specify your hotel requirements on the registration form.

Note: Hotel room availability is not guaranteed outside of scheduled program dates. Reservation deadline is May 11, 2020.

Location Details

Vancouver is located on the western coast in British Columbia. It is a diverse city surrounded by mountains, with a thriving art scene including the Museum of Anthropology, Vancouver Art Gallery, Museum of Vancouver and more. Enjoy outdoor summer activities such as the VanDusen Botanical Gardens, beaches, whale watching, hiking and more. There is something for everyone to enjoy in this city.
Welcome Reception and Dinner

Tuesday, June 16, 2020 | 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  ☐ C$75
  (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 Thursday, June 4, 2020.

Payment Information  (Please print clearly.)
Full payment in Canadian funds must accompany order. Make cheque payable to International Foundation.
☐ Cheque # ___________  C$ ___________

☐ VISA  ☐ MasterCard  ☐ Discover  ☐ American Express
Credit card # ___________________________  Exp. date _________________________
Cardholder’s name (print) ____________________________________________
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, or email continuinged@ifebp.org.

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

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 3 days (5 days for Disney properties) of arrival. Registration fee is forfeited once program commences. For details, 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.

JOIN US ONLINE

#IFEBP

Canadian Public Sector Pensions and Benefits Conference
REGISTRATION/2020
Canadian Public Sector
Pensions and Benefits Conference

Attendee Information  (Please print clearly)  Source code 2067 W

Individual ID# or CEBS® ID# ____________________________ M.I. ______ Last name ________

Employer ____________________________ Title ____________________________

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

City ____________________________ State/Province ______ Country ______ ZIP/Postal code ______

Phone ____________________________ Business ______ Home ______ Mobile ______

Email ____________________________

Form completed by ____________________________ Phone ____________________________

Not a Member? Join Now and Save! Visit www.ifebp.org/join for current rates.

□ Individual C$325  □ Organizational C$1,065

Registration Information

Bill to organization name ____________________________

Bill to organization ID # ____________________________

Badge name ____________________________ Badge title ____________________________

Special assistance—specify ____________________________

Special dietary requirements—specify ____________________________

* Must meet eligibility requirements

Go to www.ifebp.org/ATMSprereq for information on prerequisites and ATMS qualifying test.

Go to www.ifebp.org/MTMSprereq for information on prerequisites before enrolling in MTMS.

Canadian Public Sector Pensions and Benefits Conference

FMTS® (Foundations of Trust Management Standards)

ATMS® (Advanced Trust Management Standards) Session A*  ATMS® Session B*

MTMS (Masters of Trust Management Standards) Session A*  MTMS Session B*

*Must meet eligibility requirements

Go to www.ifebp.org/ATMSprereq for information on prerequisites and ATMS qualifying test.

Go to www.ifebp.org/MTMSprereq for information on prerequisites before enrolling in MTMS.

Until May 7  After May 7

Member  Nonmember  Member  Nonmember

Canadian Public Sector Pensions and Benefits Conference  C$1,375  C$1,595  C$1,675  C$1,895

FMTS  C$1,795  C$2,015  C$2,095  C$2,315

ATMS (Session A or B)  C$1,795  C$2,015  C$2,095  C$2,315

MTMS (Session A or B)  C$1,895  C$2,115  C$2,195  C$2,415

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.

Hotel


Hyatt Regency Vancouver—C$359 single/double

# of Adults ______  # of Children ______  Arrival date ______  Departure date ______

□ King bed  □ Two beds  Special requests—describe ____________________________

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 # ______  C$ ______  Credit card # ______  Expires ______

Cardholder’s name (print) ____________________________

Conference fee C$ ______  FTMS®/ATMS®/MTMS fee(s) C$ ______

Subtotal (taxable) C$ ______  GST (5%) (subject to change) C$ ______

Hotel deposit (C$450) C$ ______  Membership fee C$ ______

Total (Canadian funds) C$ ______

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

PDF-320
Session Titles

- Market Context and Rising Complexity: Technology, Economy, Demography
- A Dialogue With Canadian Public Sector Leadership
- Best Practices for Member Communication
- Financial Literacy for Plan Members
- Considerations for Implementing Sustainable Finance Into Your Plans
- More inside!

Register by May 7, 2020 to save with the early registration discount!

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