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57TH ANNUAL CANADIAN Employee Benefits Conference

November 24-27, 2024 | Grand Hyatt San Antonio | San Antonio, Texas

FULL PROGRAM AGENDA



57TH ANNUAL CANADIAN

Employee Benefits Conference



November 24-27, 2024 | Grand Hyatt San Antonio | San Antonio, Texas

Preconferences: November 22-24

As we react to a changing landscape of plan funding and consolidation, mental health considerations, cybersecurity risks, and legal and legislative changes, how will you ensure your organization is set up for success?

For over 50 years, the Annual Canadian Employee Benefits Conference has been the premier source of comprehensive education needed to run benefit and pension plans effectively. Join us in San Antonio for unbiased, objective information about upcoming trends, legislative changes and key topics impacting your funds. You'll gain actionable takeaways to improve your organization and the funds you serve.

"This conference is a must first step for any trustee wishing to operate in an effective, efficient and above all ethical manner at all times."

Sharon Penney

Group Insurance Manager
Newfoundland and Labrador
Teachers' Association (NLTA)
St. John's, Newfoundland and Labrador

Benefits of Attending

- Fulfill your fiduciary duty by staying up to date on the latest regulatory and legislative changes.
- Learn new approaches from leading industry experts.
- Receive unbiased education to help secure long-term sustainability for your fund.
- Uncover ideas to ensure your fund is maximizing its potential.
- Find out how other funds are tackling issues similar to your own, and discuss what worked and what didn't.
- Hear about emerging trends and what they could mean for your plans.
- Network with your colleagues and peers.

Conference Schedule

Thursday, November 21

PRECONFERENCE ONLY Registration 4:00-6:00 p.m.

Friday, November 22

PRECONFERENCE ONLY

Registration 7:00 a.m.-12:00 noon

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, November 23

Registration 7:00 a.m.-5:00 p.m.

Preconference Workshop 8:00 a.m.-12:00 noon

FTMS Course 8:00 a.m.-4:30 p.m.

ATMS Course 8:00 a.m.-4:00 p.m.

MTMS Course 8:00 a.m.-4:00 p.m.

Sunday, November 24

Registration 7:00 a.m.-5:00 p.m.

Preconference Workshops 8:00 a.m.-12:00 noon

MTMS Advanced Leadership Summit 8:00 a.m.-12:00 noon

Opening Entertainment* 4:15-4:45 p.m.

Opening Keynote* 4:45-6:30 p.m.

Monday, November 25

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 9:30-10:30 a.m.
10:45-11:45 a.m.

Lunch Break 11:45 a.m.-1:30 p.m.

Breakout Sessions 1:30-5:00 p.m.

Tuesday, November 26

Registration 7:00 a.m.-4:30 p.m.

Keynote Session 8:00-9:00 a.m.

Featured Sessions 9:15-10:15 a.m.
10:30-11:30 a.m.

Lunch Break 11:30 a.m.-1:15 p.m.

Breakout Sessions 1:15-4:45 p.m.

Wednesday, November 27

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

Breakout Sessions 8:00-10:15 a.m.

Closing Keynote* 10:30-11:30 a.m.

**Guests are welcome to attend.*

Visit www.ifebp.org/canannual by October 18 to register and save C\$300.



FTMS[®]

Registration code:
24F1/EL254

Foundations of Trust Management Standards

www.ifebp.org/ftms

Friday, November 22 | 8:00 a.m.-4:30 p.m.

Saturday, November 23 | 8:00 a.m.-4:30 p.m.

Are you a new trustee looking to get up to speed on the basics of trust management? Attend the Foundations of Trust Management Standards (FTMS) program, and get the knowledge you need to help ensure your plan's success. FTMS is the first step in the trustee education path, focused on the needs of new Canadian trustees.

Course Objective

The objective of FTMS is to increase **awareness** and **understanding** of the basics in the key knowledge areas of effective management of trusts:

- Legal
- Administration
- Governance
- Funding/investment/finance.

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

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 service providers.

Education Doesn't Need to Feel Daunting

This course provides the necessary tools to fulfill your responsibilities as a trustee and earn your FTMS certificate. You'll have an opportunity to network and share experiences with other new trustees while gaining the need-to-know skills to succeed in your role. The open-book, multiple-choice exam gives you time to review your notes and find the correct answers. **Don't be intimidated—Over 90% of attendees pass on their first attempt!**



"The FTMS course provided a much-needed breakdown of the trustee plan management endeavour. The instructors were excellent and broke everything down to the basics."

Barrington Price

Trustee | UA Local 67 Benefit Plans | Hamilton, Ontario



ATMS™

Advanced Trust Management Standards

www.ifebp.org/atms

Friday, November 22 | 8:00 a.m.-4:30 p.m.

Saturday, November 23 | 8:00 a.m.-4:00 p.m.

Session A
registration code:
2491/EL255

Session B
registration code:
24B8/EL256

Designed for the needs of advanced trustees, Advanced Trust Management Standards (ATMS) has engaging instruction and interactive case studies that will give you the tools you need not only to be successful in your role as a trustee, but also to look toward the future and prepare your plan for the challenges ahead. ATMS includes two sequential programs: **ATMS Session A** and **ATMS Session B**.

Course Objective

ATMS focuses on the **application** and **analysis** of the 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.

Who Should Attend

ATMS is the next step on the trustee education path for those who have taken FTMS. 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 or pass the ATMS Qualifying Test.



“The ATMS course has been great in providing additional details on greater governance for trusts and ensuring my trust is meeting the standards required.”

Vicky Yu, CHRP

Manager, Benefits | Loblaw Companies Limited | Toronto, Ontario



MTMS

Master of Trust Management Standards

www.ifebp.org/mtms

Friday, November 22 | 8:00 a.m.-4:30 p.m.

Saturday, November 23 | 8:00 a.m.-4:00 p.m.

Session A
registration code:
24M1/EL257

Session B
registration code:
24M2/EL258

For those who have completed both FTMS and ATMS, Master of Trust Management Standards (MTMS) is for leaders who are ready to look past the day-to-day operations of their funds and leverage their own unique leadership strengths and skills to optimize their contributions.

Course Objective

The objective of MTMS is to prepare longer term trustees/fiduciaries to contribute to effective board management in a leadership capacity and to fulfill the board's oversight role. The MTMS program is highly interactive, focusing on **evaluation** and **creation** of new points of view as well as behavioural change in the areas of leadership, governance, oversight, strategic planning and risk management.

MTMS consists of two courses: MTMS A and MTMS B. 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. Course materials consist of preprogram readings, pretests, on-site presentation materials, supplementary readings, sample documents and additional information for future reference. Both Session A and Session B include **capstone mock board meetings**.

Earn Your MTMS Credential

This program is the culmination of your Canadian trustee training! Once you have met your MTMS requirements, you can proudly display your MTMS credential on signatures, business cards and much more, demonstrating your unparalleled expertise in supporting and managing trust funds. Continuing education is available annually at the **MTMS Advanced Leadership Summit** where you can network with other MTMS graduates and delve deeper into topics critical to a fund's overall strategy.

Prerequisites

Before enrolling in MTMS, you must complete the ATMS Certificate of Achievement (earned by completing the course work and passing the accompanying tests for ATMS A and ATMS B).



"I enjoyed the MTMS course. It was interactive and educational. The group discussions were informative and very interesting."

Randy Marie Sloat, C.Dir.

Trustee | OPTrust | Toronto, Ontario



MTMS

Registration code:
24MS

Advanced Leadership Summit

www.ifebp.org/mtmssummit

Sunday, November 24 | 8:00 a.m.-12:00 noon

The MTMS Advanced Leadership Summit is a continuing education program for those who have earned an MTMS credential. Each Summit focuses on a topic of particular interest to plan trustees. The topic focus of the MTMS Advanced Leadership Summit will change each year to reflect the most essential issues facing trustees.

This year's topic:

Under the Hood: The Inner Workings of Commercial Mortgages

Looking to optimize your fixed income and total portfolio solutions with a consistent, income-generating asset class with low interest rate risk? Private Canadian commercial mortgages have been providing pensions, insurance companies and top fixed-income investment managers with a structural illiquidity premium to enhance their portfolios for over 50 years. Learn about the risks, mitigations and strategies employed by Canadian commercial mortgage managers to deliver compelling, risk-adjusted returns to investors.

This deep dive will cover the following topics:

- Fundamentals of commercial mortgage investments
- Assessing, mitigating and pricing credit risk
- Considerations for including mortgages in your asset mix
- Implications for mortgage fund/portfolio construction and management as well as other risk considerations.



Lezlie Mintz, M.B.A.

*Senior Vice President,
Business Development
ACM Advisors Ltd.
Montréal, Québec*



Blake Steels, CAIA, CBV, CFA

*Executive Vice President,
Head of Debt Investments
Crestpoint Real Estate Investments Ltd.
Toronto, Ontario*

Preconference Workshops

WORKSHOP LEADERS



Simon Chan, M.B.A., CFP, PMP
Principal
Adapt with Intent Consulting
Kitchener, Ontario



Roland Chiwetelu, CFP
Financial Wellness Consultant
Eckler Ltd.
Toronto, Ontario



Kyra Jones, Ph.D.
Chief Design Officer
Adapt with Intent Consulting
Kitchener, Ontario

As lifespans lengthen, we have more healthy years to enjoy, requiring plan members to focus beyond just financial planning. Through an evidence-informed perspective, this two-day workshop will help you understand and prepare for a successful and healthy retirement.

DAY ONE

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

Saturday, November 23 | 8:00 a.m.-12:00 noon

Registration code: PC01

Spouses/guests may also attend the Health, Wealth and Happiness—
Planning Your Path to a Successful Retirement workshop at a reduced price!
Use registration code PC11.

Plan members no longer need to settle for a one-size-fits-all approach to retiring. Together, we will:

- Shift your mindset from planning for retirement to designing a longevity lifestyle to meet your unique needs
- Challenge and test assumptions to play with the possible ways to find meaning and enjoyment in retirement
- Design a prototype of what retirement could look like for you and how you will spend your time in your next adventure
- Explore the challenges that exist in retirement, such as inflation, longevity and the ever-changing economic landscape
- Identify goals for retirement and how to fund your ideal retirement lifestyle
- Understand the various sources of retirement income, including government, workplace and personal income sources.

Preconference Workshops

DAY TWO

Health, Wealth and Happiness— Living Your Best Retirement (Part 2)

Sunday, November 24 | 8:00 a.m.-12:00 noon

Registration code: PC02

Spouses/guests may also attend the Health, Wealth and Happiness—
Planning Your Path to a Successful Retirement workshop at a reduced price!
Use registration code PC12.

Securing a healthy and successful retirement should not be stressful. This workshop will continue to explore tools and resources to boost and protect your retirement income and focus on achieving a *healthy and productive retirement*. Here, we will:

- Learn about the aging process and what you can do now to better prepare your mind and body for the future you
- Learn what can affect your healthy lifestyle goals and why it's important to be prepared
- Share resources that contribute to wellness and well-being, and identify activities to give your life structure and purpose postretirement
- Learn four strategies to maximize retirement income and make it more secure
- Understand how to optimize tax in retirement.

WORKSHOP LEADERS



Tyler Amell, Ph.D., M.S., B.Sc.
*Chief Health and Strategy Officer
MediKeeper, Inc.
Adjunct Faculty
Pacific Coast University for
Workplace Health Sciences
Calgary, Alberta*



Roland Chiwetelu, CFP
*Financial Wellness Consultant
Eckler Ltd.
Toronto, Ontario*



Joyce Odidison, M.A., CTD, PCC
*President and Chief Executive Officer
Interpersonal Wellness Services Inc.
Winnipeg, Manitoba*

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Keynote Speakers



Kevin Brown

Motivational Storyteller

Kevin Brown Enterprises, LLC

Orlando, Florida

Sunday Opening Keynote



The Hero Effect®—Being Your Best When It Matters the Most!

November 24 | 4:45-6:30 p.m.

In a fresh and entertaining style, Kevin shares ideas, strategies and principles that will inspire and equip participants to show up every day and make a positive difference. At the heart of Kevin's message is a simple yet powerful philosophy for life that drives every thought, every action and, ultimately, every result we achieve both personally and professionally. You will be motivated to reach beyond what is required and do something remarkable!

Monday Morning Keynote



Global Issues—The World Today

November 25 | 8:00-9:15 a.m.

Few people have a better understanding of global issues than Professor Janice Gross Stein. Her dynamic presentations provide a unique perspective into what's really happening around the world—from China to Russia and from the Middle East to Europe—and what it means to her audiences. Janice's presentations not only connect the dots regarding key events, but also provide a look at where things are headed and where the potential dangers and opportunities may lie. Both realistic and hopeful, she leaves her audiences with a better understanding of current global issues and a clear, compelling vision of the future.



Janice Gross Stein, Ph.D., LL.D., MOC, OOnt, FRSC

Founding Director, Munk School of Global Affairs & Public Policy

Belzberg Professor of Conflict Management and Negotiation

University of Toronto

Toronto, Ontario



La **traduction** simultanée en **français** des sessions susmentionnées sera offerte.

Keynote Speakers



Tina Varughese

*Cross-Cultural Communication
and Diversity Expert
t Works Inc.
Calgary, Alberta*

Tuesday Morning Keynote

The Human Side of Unconscious Bias

November 26 | 8:00-9:00 a.m.

First impressions, positive or negative, are made in seven seconds or less. We all make quick assessments of others without even realizing it. We are not born with bias. Biases are formed by past situations, experiences, backgrounds and cultures. Unconscious biases affect and impact decision making both professionally and personally, with real impact. Recognizing, managing and mitigating unconscious bias promotes diversity and inclusion. Diversity and inclusion drives innovation, increases productivity and stimulates creativity while promoting a healthy, happy and engaging workplace culture.



David Allison

*Founder
The Valuegraphics Project
Vancouver, British Columbia*

Wednesday Closing Keynote

A Shared Human Values Playbook for Trustees— Precision Decisions for Plan Members

November 27 | 10:30-11:30 a.m.

The connection between employee benefits and the underlying human values of plan members has never been more critical. How can trustees make decisions that align with what members truly care about? David Allison will unveil how trustees can use the shared values of plan members as a critical new set of insights for designing employee benefit plans.

By using data from nearly a million surveys across 152 languages, David will pinpoint the precise core human values shared by your plan members. Then, he will share the profound impact of aligning plan decisions with these values, ensuring that the benefits truly resonate with the members' core motivations and needs.

Visit www.ifebp.org/canannual
by October 18 to register and save C\$300.

Featured Sessions

Monday Morning Plenary 1

Economic Outlook 2025

November 25 | 9:30-10:30 a.m.

Topics covered will include:

- Inflation, interest rates, housing and immigration—What's in store for 2025?
- Economic implications of the U.S. election outcome
- The impact of AI on productivity
- Fiscal policy—Sustainability challenges and hard choices
- Key market risks to watch.



Jimmy Jean, CFA

*Vice-President,
Chief Economist and Strategist
Desjardins Group
Montréal, Québec*

Session de suivi :

Une session de questions-réponses sera présentée en français en après-midi le 25 novembre.



La **traduction** simultanée en **français** sera offerte.

Monday Morning Plenary 2

Legal/Legislative Developments Across Canada

November 25 | 10:45-11:45 a.m.

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

Follow-Up Afternoon Sessions

Regional updates will be presented in the afternoon on November 25.



Lisa C. Chamzuk

*Partner | Lawson Lundell LLP
Vancouver, British Columbia*



Hugh Wright

*Partner | Miller Thomson LLP
Halifax, Nova Scotia*



Mark Zigler

*Senior Partner | Koskie Minsky LLP
Toronto, Ontario*

Featured Sessions



Tuesday Morning Plenary 1

U.S. 2024 Election Results and the U.S.–Canada Relationship

November 26 | 9:15-10:15 a.m.

John Parisella will provide the 2024 U.S. election results and what they mean.

The impact of the results will then be examined from the context of the Canada–U.S. relationship, including what the impact represents and how to prepare from a Canadian perspective.

Cette session sera présentée en français l'après-midi du 25 novembre.



John Parisella, CM, OQ
*Special Advisor, Strategy and
Business Outreach
NATIONAL Public Relations
Montréal, Québec*

Tuesday Morning Plenary 2

Nurturing Resilience—How Community, Family and Colleagues Can Help Us Cope Better With Stress

November 26 | 10:30-11:30 a.m.

Throughout this fast-paced, story-filled presentation, Dr. Ungar will show that resilience is much more than just personal grit in the face of adversity. It is also a reflection of how well individuals, communities, families, colleagues and employers work together to create opportunities for us to find the resources we need for well-being while making those resources available in meaningful ways. Based on Dr. Ungar's research around the world and in his clinical practice, this presentation explores how to maintain resilience on the job and at home even when stressors pile up. Twelve factors that make us more resilient will be discussed along with practical tools participants can use to find the supports they need to cope successfully on and off the job. Dr. Ungar will also show how these same factors can help the people we work with achieve their life goals and the value of remaining connected to a network of relationships to create lifelong resilience.



Michael Ungar, Ph.D., FRSC
*Canada Research Chair in Child,
Family and Community Resilience
Director, Resilience Research Centre
Dalhousie University
Halifax, Nova Scotia*

Experience the Culture of San Antonio— Opening Session Entertainment

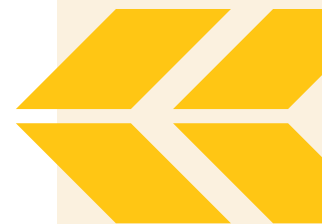
November 24 | 4:15-4:45 p.m.

We invite you to join us for a Cultural Parade Performance to kick off the Annual Conference!

Grab a front-row seat and prepare to delight in the sights and sounds of an authentic San Antonio experience—filled with local mariachi bands, ballet folklórico dancers and a Tejano band. This unique blend of rich culture and vibrant energy is one performance you sure don't want to miss!



Recommended Starter Track



New trustees and first-time attendees can be overwhelmed by the many topic choices offered at the Annual Conference. Here is a recommended track for new trustees who are looking for appropriate content across a wide range of subjects. These sessions are in addition to the keynote and featured sessions on pages 10-13.

MONDAY, NOVEMBER 25		
1:30-2:30 p.m.	Investments I01 Investments 101	
2:45-3:45 p.m.	Governance/Fiduciary Responsibility F04 Running Your Board and Committee Meetings Effectively F05-1 Food for Thought for Improving the Governance of Your Retirement Plan	
4:00-5:00 p.m.	Pensions/Retirement Security P01 Actuarial 101—Getting Back to the Actuarial Basics	
TUESDAY, NOVEMBER 26		
1:15-2:15 p.m.	Governance/Fiduciary Responsibility F03 Trustee Orientation— A Thorough, Continuing Growth Process, Not a One-Time Event	Investments I12-1 Target Date Funds
2:30-3:30 p.m.	Governance/Fiduciary Responsibility F05-2 Food for Thought for Improving the Governance of Your Retirement Plan	General Topics G03 The World Is Your Oyster— Trustee Education and Resources
3:45-4:45 p.m.	Pensions/Retirement Security P05-1 A Member’s Savings Journey— From Hire to Retire	Investments I03 Basics in Financial Performance Benchmarking
WEDNESDAY, NOVEMBER 27		
8:00-9:00 a.m.	Investments I12-2 Target Date Funds	
9:15-10:15 a.m.	Pensions/Retirement Security P05-2 A Member’s Savings Journey—From Hire to Retire	

Governance/Fiduciary Responsibility

Program Content

Conference sessions are geared toward participants with all levels of experience and are identified as basic, intermediate or advanced. Many sessions are offered twice throughout the conference, allowing for greater flexibility in creating your personalized schedule.

Content Level

Basic ■ ■ ■

Perfect for those who are just starting out in the pensions and benefits field or who have never attended an International Foundation conference.

See page 15 for a recommended track for new trustees and/or attendees.

Intermediate ■ ■ ■

Intended for those who have three to five years of experience as a trustee or fund administrator.

Advanced ■ ■ ■

Intended for those with five or more years of experience as a trustee or administrator, as well as consultants and managers.

F01 **On the Horizon—What Is the Forecast for Investing and Governance?**

■ ■ ■

- 1 Monday, 1:30-2:30 p.m.
- 2 Monday, 4:00-5:00 p.m.

What are the top five priorities for leaders in finance, plan management, and public policy over the next few years? This panel is designed to get you thinking about what's next—in governance as well as investment risk and opportunity—and how to prepare for it now.

Susan Bird, CEBS, CAIB, EPC, HIA, ICD.D

President, The McAteer Group of Companies, Edmonton, Alberta and Markham, Ontario

Steven J. Mahoney, CAIA, CFA, FSA, PRM

Chief Investment Officer, Nova Scotia Pension Services Corporation, Halifax, Nova Scotia

Laura S. Stein

Of Counsel, Robbins Geller Rudman & Dowd LLP, Jenkintown, Pennsylvania

F02 **Performance Monitoring of Your Service Providers—After the Hire**

■ ■ ■

Monday, 4:00-5:00 p.m.

This session will cover the following considerations:

- Roles and responsibilities as well as service levels
- Operational monitoring
- Monthly, quarterly and semiannual monitoring
- Annual monitoring including service provider health, performance evaluation and compliance
- Events including risk management
 - Identification, transparency and response of the service provider
 - Identification and response of the plan sponsor.

Kiersten N. Amos

Counsel, McInnes Cooper, Halifax, Nova Scotia

Jim Vlahos

Executive Director, The General Contractors' Association of Toronto, Toronto, Ontario

Lisa M. Watt, CEBS, ISCEBS-Fellow

Partner and Account Executive, Manion Wilkins & Associates Ltd., Toronto, Ontario

Program Content ■ ■ ■ Basic ■ ■ ■ Intermediate ■ ■ ■ Advanced

Governance/Fiduciary Responsibility

F03



Trustee Orientation—A Thorough, Continuing Growth Process, Not a One-Time Event

Tuesday, 1:15-2:15 p.m.

Being a trustee is an evolution. Hear how to best prepare your board with the following:

- Growth mindset
- Strategic initiatives (including mentoring, collaboration and knowledge sharing)
- Ongoing support.

Mike F. Neheli

President, Manion Wilkins & Associates Ltd., Toronto, Ontario

Jim Vlahos

Executive Director, The General Contractors' Association of Toronto, Toronto, Ontario

Lisa M. Watt, CEBS, ISCEBS Fellow

Partner and Account Executive, Manion Wilkins & Associates Ltd., Toronto, Ontario

F05



Food for Thought for Improving the Governance of Your Retirement Plan

1 Monday, 2:45-3:45 p.m.

2 Tuesday, 2:30-3:30 p.m.

This session will cover the following topics:

- Risk management
- Elements to reduce the pension gap between men and women
- CAPSA's consultation paper on ESG considerations in pension plan management.

Nathalie Joncas, ASC, FCIA, FSA

Senior Consultant, SAI Actuarial Services, Montréal, Québec

F04



Running Your Board and Committee Meetings Effectively

Monday, 2:45-3:45 p.m.

This session will cover the following topics:

- Preparation—Agenda and meeting materials
- Role of the chair—Facilitating reporting and decision making
- Documentation and record retention
- Self-assessment—Measuring your effectiveness.

Mike F. Neheli

President, Manion Wilkins & Associates Ltd., Toronto, Ontario

Bob Romphf

Trustee, Manitoba Nurses Union, Winnipeg, Manitoba

Program
Content



Basic



Intermediate



Advanced

Health and Wellness/Group Benefits

H01



Advances in Mental Health Treatment— Psychedelics and the Neuroscience of Mental Health Conditions

- 1 Monday, 1:30-2:30 p.m.
- 2 Monday, 4:00-5:00 p.m.

This session will cover:

- Composition and types of psychedelics
- Diagnosis and treatment
- Research overview.

**Robert (Rob) Tanguay, M.D., B.Sc. (Hons.),
FRCPC, CISAM, CCSAM**

Clinical Assistant Professor, University of Calgary,
Departments of Psychiatry and Surgery, Hotchkiss
Brain Institute and Mathison Centre for Mental Health,
Calgary, Alberta

H02



Managing Risk in Group Insurance

Wednesday, 9:15-10:15 a.m.

In this session, we will discuss how to optimize the following elements when managing the risks of a group benefits plan:

- Optimal stop-loss threshold and QDIPC/EP3 arrangements
- Biologic vs. biosimilar drugs
- Optimal waiting period for long-term disability
- Various financial arrangements.

Philippe Laplante, FCIA, FSA

Shareholder Principal, Eckler Ltd., Montréal, Québec

H03



Intellectual Wellness

- 1 Monday, 1:30-2:30 p.m.
- 2 Monday, 4:00-5:00 p.m.

Intellectual wellness provides a way to improve our overall health and wellness by increasing our brainpower while lowering our risk for life-altering conditions such as dementia and Alzheimer's disease. This session will:

- Show how intellectual wellness fits into our overall model of health and wellness
- Briefly discuss the impact of dementia and Alzheimer's disease on our overall health
- Discuss the potential health impacts of intellectual wellness and ways to increase intellectual wellness.

Avinash D. Maniram, M.Sc.

Partner, PBI Actuarial Consultants Ltd.,
Vancouver, British Columbia

H04



The Role of Virtual Health in Your Benefits Plan

Monday, 2:45-3:45 p.m.

Virtual care has become an essential solution in health care, providing immediate access to health care providers without the need for physical visits. Learn about the:

- Advantages of enhanced access and early intervention
- Significance for employers
- Challenges and potential cost savings for your health plan.

Mathieu Vézina, M.B.A.

National Manager, Alliances, TELUS Health,
Montréal, Québec

Health and Wellness/Group Benefits

H05



The Mental Health of Canadian Workers— A Path for Improvement and Change

Tuesday, 2:30-3:30 p.m.

This session aims to shed light on the critical topic of mental health in the workplace. We will:

- Assist participants in establishing a foundation for implementing and promoting employee assistance programs (EAPs)
- Explore the importance of reducing cost barriers related to mental health support
- Discover how educational initiatives can enhance the understanding of mental health resources and services.

Mathieu Vézina, M.B.A.

National Manager, Alliances, TELUS Health,
Montréal, Québec

H06



How to Better Manage Cancer at Work

1 Monday, 1:30-2:30 p.m.

2 Monday, 4:00-5:00 p.m.

Half of cancer survivors are of working age, and almost two-thirds (63%) of them return to work within one year or continue to work during treatment. Still, many survivors need help to overcome struggles at work. Comprehensive and practical approaches are needed. This presentation will:

- Introduce the BC Cancer/McGill University Cancer and Work website as a robust resource for Canadian cancer survivors, employers and health care providers
- Address facilitators and barriers to work using the Vocational Rehabilitation Model for Cancer Survivors
- Apply value-based health care principles that can improve health outcomes for plan members while controlling plan sponsor costs.

Chris Bonnett, Ph.D., M.H.Sc.

Principal Consultant, H3 Consulting, Guelph, Ontario

Maureen Parkinson, M.Ed., CCRC

Provincial Vocational Rehabilitation Counsellor,
BC Cancer, Surrey, British Columbia

Christine Maheu, Ph.D., RN

Associate Professor, Ingram School of Nursing,
McGill University, Montréal, Québec

Program Content

Basic Intermediate Advanced

Health and Wellness/Group Benefits

H07



Drug Trends and Strategic Insights

Tuesday, 1:15-2:15 p.m.

In recent years, private drug plans have been dominated by specialty drugs, biologics and biosimilars, and more costly treatments for chronic diseases. With regard to these drugs, this session will cover trends and strategies related to:

- Utilization rates in private plans
- Changes in clinical practice guidelines
- Cost-saving measures.

Julia D'Adamo, Pharm.D.

Pharmacy Strategy Specialist, GreenShield Canada, Montréal, Québec

H08



Empowering Women's Health— Advocating for Equity in Health Care and the Workplace

1 Tuesday, 1:15-2:15 p.m.

2 Tuesday, 3:45-4:45 p.m.

Gender bias, whether conscious or unconscious, remains a significant barrier to accessing quality health care. However, the tide is turning as women and allies recognize these challenges, work to dismantle barriers and champion gender equity. In this discussion, panelists will discuss health care accessibility, workplace culture, technological innovation and diversity considerations, uncovering actionable strategies for advancing women's health and empowerment. Key questions include:

- How are organizations proactively addressing women's unique health care needs across different life stages?
- What role do workplace culture and leadership attitudes play in shaping perceptions of women's health issues and social stigma?
- How can employers ensure their benefit packages are inclusive and responsive to women's diverse needs?

Paula Allen

Global Leader and Senior Vice President, Research and Client Insights, TELUS Health, Toronto, Ontario

Ayla Azad, D.C., M.B.A.

Chief Executive Officer, Canadian Chiropractic Association, Toronto, Ontario

Neda Nasser, Pharm.D., M.B.A., M.Sc.

Product Director, Pharmaceutical Benefits, Desjardins, Montréal, Québec

Program Content

Basic Intermediate Advanced

Pensions/Retirement Security

P01 Actuarial 101— Getting Back to the Actuarial Basics



Monday, 4:00-5:00 p.m.

Whether you're new to the pension world or a seasoned expert, this session will provide useful content on actuarial basics for pension plans. You'll walk away with:

- A high-level understanding of the actuarial valuation results
- Thoughts on how assumptions are used and the implications
- Key questions for your actuary.

Brian Yip, FCIA, FSA

Consultant, PBI Actuarial Consultants Ltd.,
Vancouver, British Columbia

P04 Can Your Pension Plan Afford Improvements?



1 Tuesday, 1:15-2:15 p.m.

2 Wednesday, 8:00-9:00 a.m.

A key feature of target benefit pension plans is the ability to make benefit changes, but how do you know when to make improvements? This session will educate trustees on:

- The process for making plan design changes
- How to determine if improvements are affordable
- Treating each generation of members fairly.

Jeff Bradley, FCIA, FSA

Principal, Eckler Ltd., Toronto, Ontario

P02 Derisking—Is Now the Time?



Wednesday, 8:00-9:00 a.m.

This session will explain derisking and explore derisking strategies ranging from liability-driven investment strategies to annuity purchase options. Attendees will learn to:

- Identify derisking opportunities
- Prepare meaningful analyses
- Understand the decision-making process.

Geneviève Lussier, FCIA, FSA, MAAA

Vice President and Actuarial Manager, Segal,
Montréal, Québec

P05 A Member's Savings Journey— From Hire to Retire



1 Tuesday, 3:45-4:45 p.m.

2 Wednesday, 9:15-10:15 a.m.

In today's diverse workforce, we see a unique convergence of generations, each facing their own financial challenges. How can you help your members overcome these hurdles? This session will explore practical ways to provide support and direction, helping every generation within your organization navigate their financial journey. Learn how to be an integral part of their financial success story.

Pat Leo, CFP

Vice President—Toronto Retirement, Gallagher,
Toronto, Ontario

P03 Pension Plan Redesign



Monday, 2:45-3:45 p.m.

This session will review vision, mission and value statements as well as different plan design options and what to consider when reviewing the provisions. We will discuss:

- What determines if your plan is successful
- Alternative plan designs
- Communicating changes to members.

Geneviève Lussier, FCIA, FSA, MAAA

Vice President and Actuarial Manager, Segal,
Montréal, Québec

For additional **Pensions** topics, please see the **Public Plans** track on page 30.

Program
Content



Legal/Legislative

L01



Legal/Legislative Update— Atlantic Canada

Monday, 1:30-2:30 p.m.

This update provides an overview of proposed and recently passed legislation and regulations as well as court decisions affecting pension and health and welfare benefit plans specific to Atlantic Canada.

Hugh Wright

Partner, Miller Thomson LLP, Halifax, Nova Scotia

L02



Legal/Legislative Update— Central Canada

Monday, 2:45-3:45 p.m.

This update provides an overview of proposed and recently passed legislation and regulations as well as court decisions affecting pension and health and welfare benefit plans specific to Central Canada.

Mark Zigler

Senior Partner, Koskie Minsky LLP, Toronto, Ontario

L03



Legal/Legislative Update— Western Canada

Monday, 4:00-5:00 p.m.

This update provides an overview of proposed and recently passed legislation and regulations as well as court decisions affecting pension and health and welfare benefit plans specific to Western Canada.

Lisa C. Chamzuk

Partner, Lawson Lundell LLP, Vancouver, British Columbia

Visit www.ifebp.org/canannual by
October 18 to register and save C\$300.

Program Content

 Basic  Intermediate  Advanced

I01



Investments 101

Monday, 1:30-2:30 p.m.

Join us to learn the fundamentals of investing with a special focus on:

- Asset classes
- Interest rates and their impact on bonds
- Risk-and-return concepts.

Tyler Smith, FCIA, FSA

Senior Institutional Client Manager, Fiera Capital, Winnipeg, Manitoba

I02



Health and Welfare Plans—Aligning Your Investment Strategy With Your Objectives

Tuesday, 2:30-3:30 p.m.

Health and welfare plans require unique investment strategies compared to pension plans. Discover how to build sustainable portfolios aligned with your benefit plans' objectives and adapt asset mixes to changing economic climates. This session will discuss:

- Key differences between health and welfare plans as well as pension plans in investment needs
- Constructing sustainable portfolios
- Navigating asset mix adjustments in response to changing economic conditions.

Tyler Smith, FCIA, FSA

Senior Institutional Client Manager, Fiera Capital, Winnipeg, Manitoba

I03



Basics in Financial Performance Benchmarking

Tuesday, 3:45-4:45 p.m.

Understanding how to benchmark your plan's financial performance can be complex, and not all benchmarks are created equal. This session will answer key questions, such as:

- What are the appropriate performance monitoring tools?
- What are the pitfalls of performance monitoring?

Brian Yip, FCIA, FSA

Consultant, PBI Actuarial Consultants Ltd., Vancouver, British Columbia

I04



Asset Allocation in a Higher Interest Rate Environment

Monday, 2:45-3:45 p.m.

The significant rise in Canadian and U.S. interest rates since the historic low in the summer of 2020 is driving asset allocation considerations for pension fund trustees.

- What is the impact of this increase on the expected returns of the different asset classes and the risk-return profile of portfolios?
- How have pension fund trustees responded to this increase so far?
- What factors should they consider relating to this increase in their asset allocation decisions?

Christian Rousseau, FCIA, FSA

Vice President, Policies and Programs, Retraite Québec, Montréal, Québec

Program Content



I05



Private Markets—A Lever for Implementing Your Convictions Through Thematic or Impact Investing

Tuesday, 3:45-4:45 p.m.

This session will cover:

- Formulating your sustainability thesis and priorities
- Identifying the most suitable approach (thematic or impact investing)
- Deploying in private markets (private equity, infrastructure, real estate, etc.).

Bruno Saintonge, CFA

Principal, Investment Consulting and Lead of Real Assets Research, Normandin Beaudry, Montréal, Québec

I06



Risk Management Through Asset Liability Matching

Tuesday, 3:45-4:45 p.m.

As a pension trustee, asset liability matching—an integral part of risk management—is a critical concept to understand and implement effectively to ensure the long-term sustainability of the pension fund. Join this session to gain insight into:

- An overview of asset liability matching
- Key objectives and issues
- Strategies and best practices.

Lilach Frenkel, FCIA, FSA

Director, Product Innovation, CAAT Pension Plan, Toronto, Ontario

I07



Index Investing Is Not Such a Passive Decision—How to Overcome the Challenges of the Evolving Index Landscape

1 Tuesday, 1:15-2:15 p.m.

2 Wednesday, 9:15-10:15 a.m.

The impact of recent volatility on traditional indices has not gone unnoticed and continues to wreak havoc on portfolios. These dynamic shifts have far-reaching implications on asset allocation and diversification strategies if left ignored. In this session, we will uncover the driving forces behind index investment performance and how to position your passive portfolio for this new market landscape, including:

- The hidden risk exposures in indexing
- Understanding the evolving investment landscape and its implications
- Strategies to adapt passive allocations to volatile markets.

Austin Guy, CFA

Vice President, Senior Investment Strategist, Northern Trust Asset Management, Chicago, Illinois

I08



Breaking Down (and Building Back Up) Your Fixed Income Allocation

Monday, 2:45-3:45 p.m.

Traditional views on fixed income often overlook the diverse risks inherent in bond investments. By dissecting fixed income allocations into various factors encompassing interest rates and credit, asset owners can better understand and optimize their portfolio exposures. This session will explore:

- Dissecting fixed income allocations into interest rate and credit risk factors
- Understanding how this granular perspective optimizes portfolio exposures
- Exploring synergies with other asset class allocations.

Aaron Young, CFA

Vice President, Global Fixed Income, CIBC Asset Management, Toronto, Ontario

Program Content

Basic Intermediate Advanced

I09 Putting the Plus Before the Core



Tuesday, 2:30-3:30 p.m.

Examine the shift to Core Plus strategies among Canadian asset owners and the impact of different management styles on fixed income's role in the portfolio. Learn how selecting a Core Plus approach can either enhance or undermine investment goals. This session looks at:

- The evolution of Core Plus strategies in asset allocation
- The impact of different management styles
- How a Core Plus approach can align with investment objectives.

Aaron Young, CFA

Vice President, Global Fixed Income,
CIBC Asset Management, Toronto, Ontario

I11 The Role of Real Estate Mortgages



Monday, 2:45-3:45 p.m.

Real estate mortgage investments can provide investors short-term fixed income exposure with the potential for higher returns. Secured by real property, these investments have contributed to attractive volatility and correlation characteristics, providing investors with a unique tool to manage the overall risk and return of their total portfolios. This session will provide background on the different factors for you to consider when allocating to mortgages, such as:

- Credit considerations
- Borrower recourse
- Liquidity.

Blake Steels, CAIA, CBV, CFA

Executive Vice President,
Head of Debt Investments, Crestpoint Real Estate
Investments Ltd., Toronto, Ontario

I10 Navigating a Changing Landscape in Emerging Markets



1 Tuesday, 2:30-3:30 p.m.

2 Wednesday, 9:15-10:15 a.m.

Emerging markets (EM) stocks offer an exciting opportunity for value-oriented investors. Challenge the myths surrounding EM investing and learn strategies to capitalize on this overlooked asset class. This session will explore:

- The myths associated with EM investing
- Navigating risks of EM
- Opportunities available in EM stocks and currencies.

Christopher Horwood, M.B.A., CFA

Head of Institutional Business, Canada,
Orbis Investments, Vancouver, British Columbia

I12 Target Date Funds



1 Tuesday, 1:15-2:15 p.m.

2 Wednesday, 8:00-9:00 a.m.

This session will:

- Define target date funds and how they are used
- Distinguish between trustee-directed and participant-selected funds
- Explain fee structures
- Explore glide paths and issues related to glide paths
- Discuss participant communication.

Jon Knowles, CFA

Institutional Portfolio Manager, Global Asset Allocation,
Fidelity Investments, Toronto, Ontario

Program
Content



I13



Decumulation Strategies

- 1 Monday, 1:30-2:30 p.m.
- 2 Monday, 4:00-5:00 p.m.

Decumulation strategies are a cornerstone of effective pension planning, ensuring sustained financial well-being of plan participants throughout retirement. This session will examine:

- Strategies to mitigate longevity risk
- Asset allocation
- Dynamic withdrawal approaches
- Participant education and support.

Jafer Naqvi, CFA

Vice President and Director, Lead of Institutional Asset Allocation, TD Asset Management, Toronto, Ontario

I14



Liquidity Management

- 1 Monday, 1:30-2:30 p.m.
- 2 Monday, 4:00-5:00 p.m.

Should cash be an allocation in your investment policy, or is it solely a medium for transferring contributions and benefit payments to and from your investment portfolio? This session will look into the importance of liquidity management for pension plans by highlighting best practices and innovative approaches to pension liquidity challenges.

Kathleen Walters, CFA

Senior Client Investment Officer, Northern Trust Asset Management, Chicago, Illinois

I15



The Natural Evolution of Discount Rates

Wednesday, 8:00-9:00 a.m.

Market interest rates have a significant knock-on effect on the discount rates used in pension plan valuations—but there is more at play in their evolution. This session will provide:

- A contextual comparison of changes to this key assumption over the years
- Contrast between the discount rate and actual rates of return of the various market indices that contribute to its determination
- A high-level overview of the impacts on funded positions and opportunities for derisking.

Marc-André Vinson, ACIA, ASA

Senior Consultant and Director, Ottawa, SAI Actuarial Services, Ottawa, Ontario

I16



What Colour Is My Bond?

Wednesday, 8:00-9:00 a.m.

This session will cover the following topics:

- The role ESG plays in fixed income
- The definition of sustainable finance, including green, social and sustainable bonds
- Not all sustainable finance is created equal—How do we evaluate?

Sue McNamara, CFA

Senior Vice President, Fixed Income, Head of Responsible Investing, Beutel, Goodman & Company Ltd., Toronto, Ontario

A01 Cybersecurity—The Continued Evolution

Monday, 2:45-3:45 p.m.

Cybersecurity needs are constantly changing as cybercriminals enhance their capabilities—What is reasonably expected of trustees and third-party service providers, and what are the impacts of the ever-evolving technology landscape? Trust funds hold valuable information (including members' personal data) and, as a result, are a prime target for attack. This session will focus on:

- Privacy and security considerations for trust funds
- Generative AI and its security and privacy implications
- Recent regulatory guidance.

Krista Tartaglia, CA, CPA
Partner, BDO Canada LLP, Oakville, Ontario

A03 The Role of the Trustees in Collecting Delinquencies

- 1 Tuesday, 1:15-2:15 p.m.
- 2 Wednesday, 8:00-9:00 a.m.

Learn about the effect of the various applicable statutes that come to bear in enforcing the employee benefits contributions provisions of collective agreements (e.g., the Labour Relations Act, Bankruptcy and Insolvency Act, Bank Act, Companies' Creditors Arrangement Act, Business Corporations Act (which covers liabilities on directors), Criminal Code (including interest chargeable)).

David Ragni
Associate, Koskie Minsky LLP, Toronto, Ontario

A02 Top Fraud Risks That Organizations Should Watch For

Tuesday, 3:45-4:45 p.m.

This session will examine some of the opportunities that allow fraud to occur, the motivation and rationalization for committing it, and how best to position your organization to mitigate the top five fraud risks in 2024 and beyond. What are the lessons learned from recent cases? The top fraud risks include:

- Cyber
- Employee
- Wire
- Procurement
- Insurance.

Bishara Rizek, CA, CPA
Partner, BDO Canada LLP, Oakville, Ontario

Communication

C01



Driving Engagement Through Tech— Modernizing Benefits Communication

- 1 Tuesday, 2:30-3:30 p.m.
- 2 Wednesday, 8:00-9:00 a.m.

Digital sprawl and competition for attention have made it harder than ever for trustees and plan sponsors to effectively manage communications, now across multiple channels and formats. Employees who feel informed and supported are more productive and more likely to stay with their employer, but their expectations and communication needs change over time. This requires trustees and plan sponsors to continuously evolve their communication approach—and toolkit.

With case studies and practical takeaways, we'll dive into several impactful technologies that can improve communication and engagement in your programs. From AI to websites, from automation to video and from gamification to data analytics, it's not as hard as you might think to leverage the latest technology to transform your benefits communications to maximize employee engagement.

Melanie Crutchley, M.Sc., M.B.A.

Founder and Lead Marketing Consultant,
Futurpruf Marketing Inc., Toronto, Ontario

Valerie Travis

Founder and Principal Consultant, Bespoke
Benefit Solutions, Agassiz, British Columbia

C02



Harnessing Member Insights to Maximize Plan Outcomes

- 1 Monday, 2:45-3:45 p.m.
- 2 Tuesday, 1:15-2:15 p.m.

Everyone recognizes the importance of gathering data and research to understand plan members and the plans we offer to them. But how many of us have a clear idea of what to look for, how to interpret those insights and how to use them most effectively? In this session, you'll learn how to:

- Create a meaningful suite of insights and organize them into a dashboard
- Use data and research across key categories such as communication, understanding, benchmarking and value/appreciation
- Distinguish between the dos and don'ts of survey research
- Understand attitudes and context to create a better member experience.

Christopher Lee

Vice President, Employee Experience and Internal
Communication Practice, Gallagher, Toronto, Ontario

Apprenticeship and Training

T01



Workforce Deployment Through SEIU Healthcare

- 1 Monday, 1:30-2:30 p.m.
- 2 Tuesday, 2:30-3:30 p.m.

The SEIU Healthcare Training Centre provides workforce development opportunities. This includes a proprietary workforce deployment platform that provides participant employers with access to thousands of high-quality union workers who are matched to shifts in situations where the union seniority list has been exhausted and an agency would otherwise be called. As a union platform, members who participate have access to competitive wages set by the union, a retirement benefits plan and extended health care. Learn more about this exciting new platform that offers an alternative to the traditional agency model.

Tyler Downey

Secretary Treasurer, SEIU Healthcare Canada, Richmond Hill, Ontario

John Klein

Chief of Staff, SEIU Healthcare Canada, Richmond Hill, Ontario

T02



Financial Literacy for Apprentices

- 1 Tuesday, 1:15-2:15 p.m.
- 2 Tuesday, 3:45-4:45 p.m.

Financial literacy education for apprentices is essential for preparing them for their careers, increasing retention and promoting long-term financial well-being. This session will discuss:

- The need for financial literacy
- Best practices
- Retention impact
- Wellness impact.

Thomas J. Kriger, Ph.D.

Director of Education and Research, North America's Building Trades Unions (NABTU), Washington, D.C.

Lovey Sidhu, M.Ed.

Director of Workforce Development, SkillPlan, Burnaby, British Columbia

Mark Kalinowski, AFCC

Partnership and Education Specialist, Credit Counselling Society, New Westminster, British Columbia

Program Content



Basic



Intermediate



Advanced

Public Plans

PE01



Does Size Matter? Exploring the Effects of Consolidation in the Pension Plan Industry

- 1 Monday, 1:30-2:30 p.m.
- 2 Monday, 4:00-5:00 p.m.

The pension plan landscape has experienced significant consolidation in recent years with the emergence of larger multi-employer plans. This session will examine the potential benefits and drawbacks of this trend, focusing on whether individual plans can maintain their investment autonomy while reaping the competitive advantages of joining larger entities.

Ramy Rayes, ACIA, ASA, FRM

Executive Vice President, Investment Strategy and Risk, British Columbia Investment Management Corporation (BCI), Victoria, British Columbia

Gary Yee, MTMS, ICD.D

Pension Coordinator, Canadian Union of Public Employees (CUPE), Burnaby, British Columbia

PE02



Plan Design Change— Case Studies and Lessons Learned

- 1 Tuesday, 2:30-3:30 p.m.
- 2 Wednesday, 9:15-10:15 a.m.

The BC Public Service Pension Plan changed its design to unlink from the Canada Pension Plan and to preserve the balance between contributions and benefits. Hear about the change process and lessons learned in areas including:

- Planning and design
- Systems and communication
- Member consultation
- How lessons were applied to a subsequent plan change.

Tom Vincent, M.B.A., ICD.D

Past Chair, BC Public Service Pension Plan Board, Victoria, British Columbia

Visit www.ifebp.org/canannual by October 18 to register and save C\$300.

Program Content

Basic Intermediate Advanced

G01 **Designing Inclusive Benefits and Pension Programs for the Evolving Workplace**



- 1 **Tuesday, 2:30-3:30 p.m.**
- 2 **Wednesday, 9:15-10:15 a.m.**

Today's workplace is more diverse than ever, with many different generations working side by side both in person and remotely. To attract talent and keep employees engaged, employers need to commit to health equity in their programs. Learn about the importance of diversity, equity and inclusion in benefits and pension programs as well as current and evolving practices to meet the dynamic needs of employees now and in the future.

Susan Hunter, CHRL, CCMP, CCP
Diversity, Equity and Inclusion Consultant,
Toronto, Ontario

G02 **Understanding the Business Case for Reconciliation**



- 1 **Tuesday, 1:15-2:15 p.m.**
- 2 **Tuesday, 3:45-4:45 p.m.**

In this session, we will:

- Explore the meaning of reconciliation and how it can contribute to a more inclusive and sustainable culture
- Discuss the benefits of reconciliation in terms of employee satisfaction, retention, innovation and market competitiveness
- Provide practical strategies for integrating reconciliation principles into company policies and practices
- Discuss ways to promote diversity, equity and inclusion within the workplace, including hiring practices, employee training and cultural competency initiatives.

Sabre Pictou Lee, J.D., M.A., B.F.A.
Chief Executive Officer, Archipel Research
and Consulting, Ottawa, Ontario

G03 **The World Is Your Oyster—Trustee Education and Resources**



- Tuesday, 2:30-3:30 p.m.**

As a trustee, you must keep up to date on legislative developments and trends. Gain an understanding of the value of trustee education in key knowledge areas. Learn how the International Foundation's programs can support you on your educational path, and explore Foundation resources, including topic web pages, customized research, survey results and curated news.

Bob Romphf
Trustee, Manitoba Nurses Union, Winnipeg, Manitoba

Julie Stich, CEBS, CEBS Compliant
Vice President, Content, International Foundation of
Employee Benefit Plans, Brookfield, Wisconsin

Bryan Zoran, CEBS
Director, Educational Programs—Canada,
International Foundation of Employee Benefit Plans,
Brookfield, Wisconsin

G04 **Trustees Bear Pit**



- 1 **Tuesday, 3:45-4:45 p.m.**
- 2 **Wednesday, 9:15-10:15 a.m.**

This facilitated open forum allows trustees to discuss issues of importance to all trustees and the funds they represent.

Kevin Bryenton
General Secretary, International Association of Bridge,
Structural, Ornamental and Reinforcing Ironworkers,
Washington, D.C.

**Marg Romanow, RN, CEBS, MTMS,
ICD.D, Q.Arb, Q.Med**
Pension Board Trustee, Regina, Saskatchewan

KNA **Conférence d'ouverture du dimanche**
The Hero Effect—Donner le meilleur de soi-même au moment le plus important !
Dimanche, 16 h 45 – 18 h 30

Dans un style frais et divertissant, Kevin Brown partage des idées, des stratégies et des principes qui inspireront et équiperont les participants pour qu'ils se présentent chaque jour et fassent une différence positive. Au cœur de son message se trouve une philosophie de vie simple mais puissante qui guide chaque pensée, chaque action et, en fin de compte, chaque résultat que nous obtenons tant sur le plan personnel que professionnel. Vous serez motivé pour aller au-delà de ce qui est requis et faire quelque chose de remarquable !

Kevin Brown
Conférencier motivateur, Kevin Brown Enterprises, LLC, Orlando, Floride

KNB **Conférence du lundi matin**
Enjeux mondiaux – Le monde d'aujourd'hui
Lundi, 8 h 00 – 9 h 15

Peu de personnes ont une meilleure compréhension des enjeux mondiaux que la professeure Janice Gross Stein. Ses présentations dynamiques offrent une perspective unique sur ce qui se passe réellement dans le monde – de la Chine à la Russie et du Moyen-Orient à l'Europe – et sur ce que cela signifie pour vous. Les présentations de Janice ne se contentent pas de faire le lien entre les événements clés, elles donnent également un aperçu de la direction que prennent les choses et des dangers et opportunités potentiels. À la fois réaliste et pleine d'espoir, elle laisse son public avec une meilleure compréhension des enjeux mondiaux actuelles et une vision claire et convaincante de l'avenir.

Janice Gross Stein, Ph.D., LL.D., MOC, OOnt, FRSC
Directrice fondatrice, professeure et titulaire de la chaire Belzberg en gestion des conflits et négociations au Département de science politique à l'École Munk des affaires internationales et politiques publiques de l'Université de Toronto, Toronto, Ontario

MP01 **Plénière 1, lundi matin**
Aperçu économique 2025
Lundi, 9 h 30 – 10 h 30

Les sujets abordés seront les suivants :

- Inflation, taux d'intérêt, logement et immigration – Que nous réserve 2025 ?
- Les implications économiques du résultat des élections américaines
- L'incidence de l'IA sur la productivité
- Politique budgétaire – Défis de durabilité et choix difficiles
- Les principaux risques de marché à surveiller.

Jimmy Jean, CFA
Vice-président, économiste en chef et stratège, Mouvement Desjardins, Montréal, Québec

FR01 **Questions-réponses avec l'économiste Jimmy Jean**
Lundi, 10 h 45 – 11 h 45

Cette session offre l'occasion d'obtenir des réponses à vos questions par un économiste de premier plan, couvrant des questions telles que :

- à quoi s'attendre de l'économie en 2024-2025
- état de l'inflation et des taux d'intérêt
- léthargie de la productivité au Québec et pistes d'action.

Jimmy Jean, CFA
Vice-président, économiste en chef et stratège, Mouvement Desjardins, Montréal, Québec

FR02 Les résultats de l'élection américaine de 2024 et les relations entre les États-Unis et le Canada

Lundi, 13 h 30 – 14 h 30

John Parisella présentera les résultats de l'élection de 2024 aux États-Unis et leur signification. L'impact des résultats sera ensuite examiné dans le contexte des relations entre le Canada et les États-Unis – ce que cela représente et comment s'y préparer du point de vue canadien.

John Parisella, CM, OQ

Conseiller spécial, Stratégie et rayonnement, Cabinet de relations publiques NATIONAL, Montréal, Québec

FR03 Marchés privés : un levier pour exprimer ses convictions via l'investissement thématique ou d'impact

Lundi, 14 h 45 – 15 h 45

Cette session abordera les aspects suivants :

- élaborer sa thèse de durabilité et ses priorités ;
- définir l'approche privilégiée (investissement thématique ou d'impact) ;
- déployer en marchés privés (placements privés, infrastructure, immobilier, etc.).

Bruno Saintonge, CFA

Conseiller principal, Gestion d'actifs et Chef de la recherche en actifs tangibles, Normandin Beaudry, Montréal, Québec

FR04 Perspectives stratégiques et tendances médicaments

Lundi, 16 h 00 - 17 h 00

Ces dernières années, les régimes privées d'assurance médicament ont été dominées par les médicaments de spécialité, les traitements biologiques et biosimilaires, ainsi que les médicaments plus coûteux pour traiter les maladies chroniques. En ce qui concerne ces médicaments, Mme D'Adamo aborde les tendances médicaments et stratégies associées aux éléments suivants :

- les taux d'utilisation dans les régimes privées ;
- les changements dans les lignes directrices ;
- les mesures d'économie.

Julia D'Adamo, Pharm.D.

Spécialiste de la stratégie pharmaceutique, GreenShield Canada, Montréal, Québec

FR05 Allocation d'actif dans un environnement de taux d'intérêt plus élevés

Mardi, 8 h 00 - 9 h 00

La hausse importante des taux d'intérêt canadiens et américains depuis le creux historique de l'été 2020 suscite des réflexions sur l'allocation d'actif chez les fiduciaires de caisses de retraite.

- Quel est l'effet de cette hausse sur les rendements attendus des différentes catégories d'actif et sur le profil rendement-risque des portefeuilles ?
- Comment les fiduciaires de caisses de retraite ont-ils réagi à cette hausse jusqu'à maintenant ?
- Quels sont les facteurs à considérer en lien avec cette hausse dans les décisions d'allocation d'actif ?

Christian Rousseau, FICA, FSA

Vice-président aux politiques et aux programmes, Retraite Québec, Montréal, Québec

FR06 L'évolution naturelle des taux d'actualisation

Mardi, 9 h 15 – 10 h 15

Les taux d'intérêt du marché ont un effet d'entraînement important sur les taux d'actualisation utilisés pour l'évaluation des régimes de retraite – mais il y a d'autres facteurs en jeu dans leur évolution. Cette session vous offrira :

- une comparaison contextuelle des changements apportés à cette hypothèse clé au fil du temps ;
- le contraste entre les taux d'actualisation et le rendement des différents indices de marché qui contribuent à leur élaboration ;
- un aperçu des répercussions sur la situation financière des régimes de retraite et les opportunités pour la réduction des risques.

Marc-André Vinson, AICA, ASA

Conseiller principal, Services actuariels SAI, Ottawa, Ontario

FR07 Développements émergents dans la gestion des risques des régimes de retraite

Mardi, 10 h 30 – 11 h 30

Cette session couvrira :

- Les origines de la gouvernance et gestion des risques, incluant l'évolution du rôle des autorités gouvernementales, les scandales Enron et autres au niveau corporatif et les lignes directrices de l'ACOR ;
- Meilleures pratiques pour les fiduciaires ; et
- Ce que nous réserve l'avenir en matière de gouvernance / gestion de risques, incluant les lignes directrices de l'ACOR, les facteurs ESG et la protection de la vie privée / cybersécurité.

Sonia Massicotte, LL.B.

Avocate et Conseillère, PBI Conseillers en actuariat, Montréal, Québec

FR08 Réduction des risques : Est-ce le bon moment ?

Mardi, 13 h 15 – 14 h 15

Cette session expliquera les solutions pour adresser tous les besoins de réduction des risques allant des stratégies d'investissement guidés par le passif aux contrats d'achat de rentes collectives avec ou sans rachat des engagements. Les participants apprendront à :

- Identifier les possibilités de réduction des risques
- Préparer des analyses de risque pour supporter le processus de prise de décision
- Comprendre le processus de prise de décision.

Geneviève Lussier, FICA, FSA, MAAA

Vice-présidente et directrice de l'actuariat, Segal, Montréal, Québec

FR09 La gestion des risques en assurance collective

Mardi, 14 h 30 – 15 h 30

Lors de cette session, nous exposerons comment les éléments suivants peuvent être optimisés afin de gérer les risques inhérents à la gestion de régimes d'assurances collectives :

- le seuil de mise en commun optimal et SCAMQ / arrangements EP3 ;
- médicaments biologiques vs. Biosimilaires ;
- le délai de carence optimal en invalidité de longue durée ;
- les différents arrangements financiers.

Philippe Laplante, FICA, FSA

Directeur et actionnaire, Eckler Ltée, Montréal, Québec

FR10 De quelle couleur est mon obligation ?

Mardi, 15 h 45 – 16 h 45

Cette session abordera les questions suivantes :

- Le rôle que jouent les facteurs ESG dans les titres à revenu fixe
- Qu'est-ce que la finance durable – obligations vertes, sociales et durables ?
- Les finances durables ne sont pas toutes égales – comment l'évaluons-nous ?

Dominic Plante, CFA

Vice-président, Services à la clientèle / développement des affaires, Beutel Goodman Conseillers en placement, Toronto, Ontario

FR11 Table ronde

Mercredi, 9 h 15 – 10 h 15

Les membres de ce panel discuteront des tendances futures et des principaux sujets ayant un impact sur les fonds de pension en 2024.

Dominic Plante, CFA

Vice-président, Services à la clientèle / développement des affaires, Beutel Goodman Conseillers en placement, Toronto, Ontario

Christian Rousseau, FICA, FSA

Vice-président aux politiques et aux programmes, Retraite Québec, Montréal, Québec

Bruno Saintonge, CFA

Conseiller principal, Gestion d'actifs et Chef de la recherche en actifs tangibles, Normandin Beaudry, Montréal, Québec



En tant que participant, vous apprendrez les derniers développements réglementaires et législatifs, les tendances futures ainsi que les nouveaux indicateurs et options disponibles pour réduire vos coûts et améliorer vos résultats. Apprenez de nouvelles approches créatives aux défis des fonds de pension et des avantages sociaux, et découvrez des solutions éprouvées utilisées par plus de 1 500 collègues et experts de l'industrie.

Inscrivez-vous sans tarder pour profiter du tarif réduit !

Conference Schedule: Sunday/Monday

Governance/Fiduciary
Responsibility

Health and Wellness/
Group Benefits

Pensions/
Retirement Security

Legal/Legislative

Investments


SUNDAY, NOVEMBER 24

4:45-6:30 p.m.


OPENING KEYNOTE: The Hero Effect®—Being Your Best When It Matters the Most! 

MONDAY, NOVEMBER 25

8:00-9:15 a.m.

KEYNOTE SESSION: Global Issues—The World Today 

9:30-10:30 a.m.

FEATURED SESSION: Economic Outlook 2025 

10:45-11:45 a.m.

FEATURED SESSION: Legal/Legislative Developments Across Canada

11:45 a.m.-1:30 p.m.—Lunch Break

1:30-2:30 p.m.

F01-1
On the Horizon—
What Is the Forecast
for Investing and
Governance?

H01-1
Advances in Mental
Health Treatment—
Psychedelics and the
Neuroscience of Mental
Health Conditions

H03-1
Intellectual Wellness

H06-1
How to Better Manage
Cancer at Work

L01
Legal/Legislative
Update—Atlantic
Canada

I01
Investments 101
I13-1
Decumulation Strategies
I14-1
Liquidity Management

2:45-3:45 p.m.

F04
Running Your Board
and Committee
Meetings Effectively

F05-1
Food for Thought
for Improving the
Governance of Your
Retirement Plan

H04
The Role of Virtual
Health in Your
Benefits Plan

P03
Pension Plan Redesign

L02
Legal/Legislative
Update—Central
Canada

I04
Asset Allocation in a
Higher Interest Rate
Environment
I08
Breaking Down (and
Building Back Up) Your
Fixed Income Allocation
I11
The Role of Real
Estate Mortgages

4:00-5:00 p.m.

F01-2
On the Horizon—
What Is the Forecast
for Investing and
Governance?

F02
Performance
Monitoring of Your
Service Providers—
After the Hire

H01-2
Advances in Mental
Health Treatment—
Psychedelics and the
Neuroscience of Mental
Health Conditions

H03-2
Intellectual Wellness

H06-2
How to Better Manage
Cancer at Work

P01
Actuarial 101—
Getting Back to the
Actuarial Basics

L03
Legal/Legislative
Update—Western
Canada


I13-2
Decumulation Strategies
I14-2
Liquidity Management

 Traduction simultanée en français


Conference Schedule: Sunday/Monday


Administration	Communication	Apprenticeship, Training and Education	Public Plans	General Topics	Volet francophone
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SUNDAY, NOVEMBER 24

OPENING KEYNOTE: The Hero Effect®—Being Your Best When It Matters the Most! 

MONDAY, NOVEMBER 25

KEYNOTE SESSION: Global Issues—The World Today 

FEATURED SESSION: Economic Outlook 2025 

FEATURED SESSION: Legal/Legislative Developments Across Canada	FR01 Questions-réponses avec l'économiste Jimmy Jean
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Lunch Break

	T01-1 Workforce Deployment Through SEIU Healthcare	PE01-1 Does Size Matter? Exploring the Effects of Consolidation in the Pension Plan Industry	FR02 Les résultats de l'élection américaine de 2024 et les relations entre les États-Unis et le Canada
A01 Cybersecurity—The Continued Evolution	C02-1 Harnessing Member Insights to Maximize Plan Outcomes		FR03 Marchés privés : un levier pour exprimer ses convictions via l'investissement thématique ou d'impact
		PE01-2 Does Size Matter? Exploring the Effects of Consolidation in the Pension Plan Industry	FR04 Perspectives stratégiques et tendances médicaments

Conference Schedule: Tuesday

Governance/Fiduciary
Responsibility

Health and Wellness/
Group Benefits

Pensions/
Retirement Security

Investments

TUESDAY, NOVEMBER 26

8:00-9:00 a.m. **KEYNOTE SESSION:** The Human Side of Unconscious Bias

9:15-10:15 a.m. **FEATURED SESSION:** U.S. 2024 Election Results and the U.S.–Canada Relationship

10:30-11:30 a.m. **FEATURED SESSION:** Nurturing Resilience—How Community, Family and Colleagues Can Help Us Cope Better With Stress

11:30 a.m.-1:15 p.m.—Lunch Break

1:15-2:15 p.m.

F03
Trustee Orientation—
A Thorough, Continuing
Growth Process, Not a
One-Time Event

H07
Drug Trends and
Strategic Insights
H08-1
Empowering Women’s
Health—Advocating for
Equity in Health Care
and the Workplace

P04-1
Can Your Pension Plan
Afford Improvements?

I07-1
Index Investing Is Not Such a Passive Decision—
How to Overcome the Challenges of the Evolving
Index Landscape

I12-1
Target Date Funds

2:30-3:30 p.m.

F05-2
Food for Thought
for Improving the
Governance of Your
Retirement Plan

H05
The Mental Health of
Canadian Workers—
A Path for Improvement
and Change

I02
Health and Welfare Plans—
Aligning Your Investment Strategy
With Your Objectives

I09
Putting the Plus Before the Core

I10-1
Navigating a Changing Landscape in
Emerging Markets

3:45-4:45 p.m.

H08-2
Empowering Women’s
Health—Advocating for
Equity in Health Care
and the Workplace

P05-1
A Member’s Savings
Journey—From Hire
to Retire

I03
Basics in Financial Performance Benchmarking

I05
Private Markets—A Lever for Implementing Your
Convictions Through Thematic or Impact Investing

I06
Risk Management Through Asset Liability Matching

Conference Schedule: Tuesday

Administration	Communication	Apprenticeship, Training and Education	Public Plans	General Topics	Volet francophone
TUESDAY, NOVEMBER 26					
KEYNOTE SESSION: The Human Side of Unconscious Bias					FR05 Allocation d'actif dans un environnement de taux d'intérêt plus élevés
FEATURED SESSION: U.S. 2024 Election Results and the U.S.–Canada Relationship					FR06 L'évolution naturelle des taux d'actualisation
FEATURED SESSION: Nurturing Resilience—How Community, Family and Colleagues Can Help Us Cope Better With Stress					FR07 Développements émergents dans la gestion des risques des régimes de retraite
Lunch Break					
A03-1 The Role of the Trustees in Collecting Delinquencies	C02-2 Harnessing Member Insights to Maximize Plan Outcomes	T02-1 Financial Literacy for Apprentices		G02-1 Understanding the Business Case for Reconciliation	FR08 Réduction des risques : Est-ce le bon moment ?
	C01-1 Driving Engagement Through Tech—Modernizing Benefits Communication	T01-2 Workforce Deployment Through SEIU Healthcare	PE02-1 Plan Design Change—Case Studies and Lessons Learned	G01-1 Designing Inclusive Benefits and Pension Programs for the Evolving Workplace G03 The World Is Your Oyster—Trustee Education and Resources	FR09 La gestion des risques en assurance collective
A02 Top Fraud Risks That Organizations Should Watch For		T02-2 Financial Literacy for Apprentices		G02-2 Understanding the Business Case for Reconciliation G04-1 Trustees Bear Pit	FR10 De quelle couleur est mon obligation ?

Conference Schedule: Wednesday

	Governance/Fiduciary Responsibility	Health and Wellness/ Group Benefits	Pensions/ Retirement Security	Investments	Administration
WEDNESDAY, NOVEMBER 27					
8:00-9:00 a.m.			P02 Derisking— Is Now the Time? P04-2 Can Your Pension Plan Afford Improvements?	I12-2 Target Date Funds I15 The Natural Evolution of Discount Rates I16 What Colour Is My Bond?	A03-2 The Role of the Trustees in Collecting Delinquencies
9:15-10:15 a.m.		H02 Managing Risk in Group Insurance	P05-2 A Member's Savings Journey—From Hire to Retire	I07-2 Index Investing Is Not Such a Passive Decision—How to Overcome the Challenges of the Evolving Index Landscape I10-2 Navigating a Changing Landscape in Emerging Markets	
10:30-11:30 a.m.	CLOSING KEYNOTE: A Shared Human Playbook for Trustees—Precision Decisions for Plan Members				

	Communication	Apprenticeship, Training and Education	Public Plans	General Topics	Volet francophone
WEDNESDAY, NOVEMBER 27					
8:00-9:00 a.m.	C01-2 Driving Engagement Through Tech— Modernizing Benefits Communication				
9:15-10:15 a.m.			PE02-2 Plan Design Change— Case Studies and Lessons Learned	G01-2 Designing Inclusive Benefits and Pension Programs for the Evolving Workplace G04-2 Trustees Bear Pit	FR11 Table ronde
10:30-11:30 a.m.	CLOSING KEYNOTE: A Shared Human Playbook for Trustees—Precision Decisions for Plan Members				

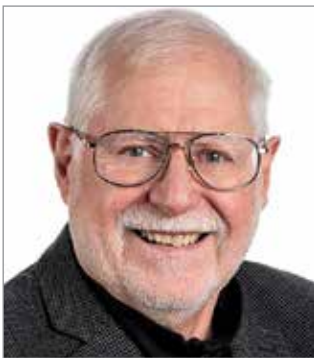
Canadian Lifetime Volunteer Award Winner



In recognition of invaluable contributions toward the enrichment of International Foundation education efforts and membership, the International Foundation is pleased to present the 2024 Canadian Lifetime Volunteer Award to Robert (Bob) Romphf.

Presentation of Award

Keynote Session Welcome | Monday, 8:00 a.m.



Honouree

Robert (Bob) Romphf

Trustee

Manitoba Nurses Union

Winnipeg, Manitoba

Robert (Bob) Romphf has been involved in the employee benefits arena for over 35 years. He is responsible for representing the Manitoba Nurses Union on plans such as HEPP/HEBP Manitoba, Winnipeg Civic Employee Benefits Program and Canadian Blood Services Pension Plan. Bob is also a trustee on the Canadian Wheat Board Retiree Trust. He has a keen interest and acts as an advocate on pension, benefit and investment issues. Bob has indicated his acute concern regarding the future ability of funds to deliver their promises to plan members. He is a retired registered nurse and graduate of the Certificate Program on Healthcare Administration from the University of Saskatchewan.

Bob has written and lectured on numerous pension, benefits and wellness issues. He is a current member of the International Foundation of Employee Benefit Plans Canadian Board and a past Voting and Advisory Director on the Board of Directors, and he has previously served as Chair of the Canadian Board. Bob also is a past member of the Canadian Strategic and Program Planning Committee and the Canadian Legal/Legislative and Public Sector Committee.

Hotel Information

★ Grand Hyatt San Antonio

US\$184 single/double occupancy
US\$209 triple occupancy
US\$234 quadruple occupancy

You will be charged a C\$400 deposit upon registration.

1 San Antonio Marriott Rivercenter

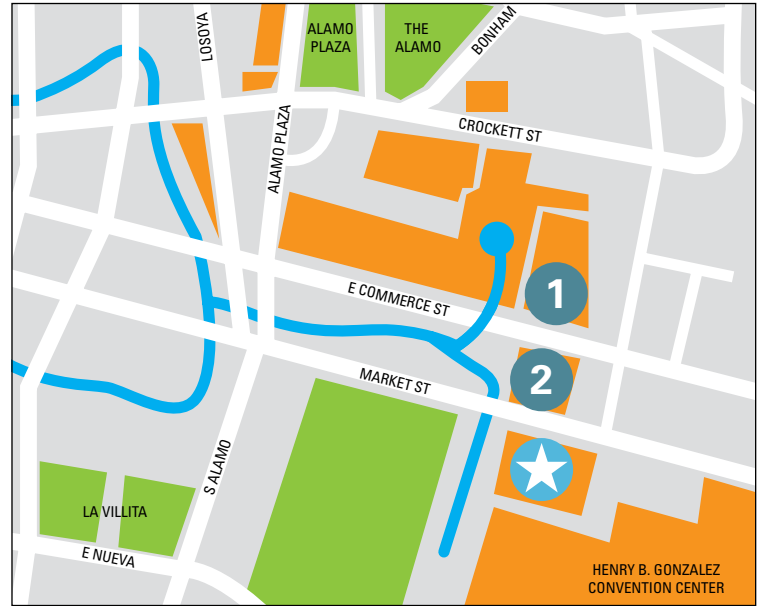
US\$179 single/double occupancy
US\$199 triple occupancy
US\$219 quadruple occupancy

You will be charged a C\$400 deposit upon registration.

2 San Antonio Marriott Riverwalk

US\$179 single/double occupancy
US\$199 triple occupancy
US\$219 quadruple occupancy

You will be charged a C\$400 deposit upon registration.



Reservation Deadline:

October 15, 2024 | Please specify your hotel requirements when registering.
Note: Hotel room availability is not guaranteed outside of scheduled program dates.

Policies:

Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of 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. Visit www.ifebp.org/policies for details.

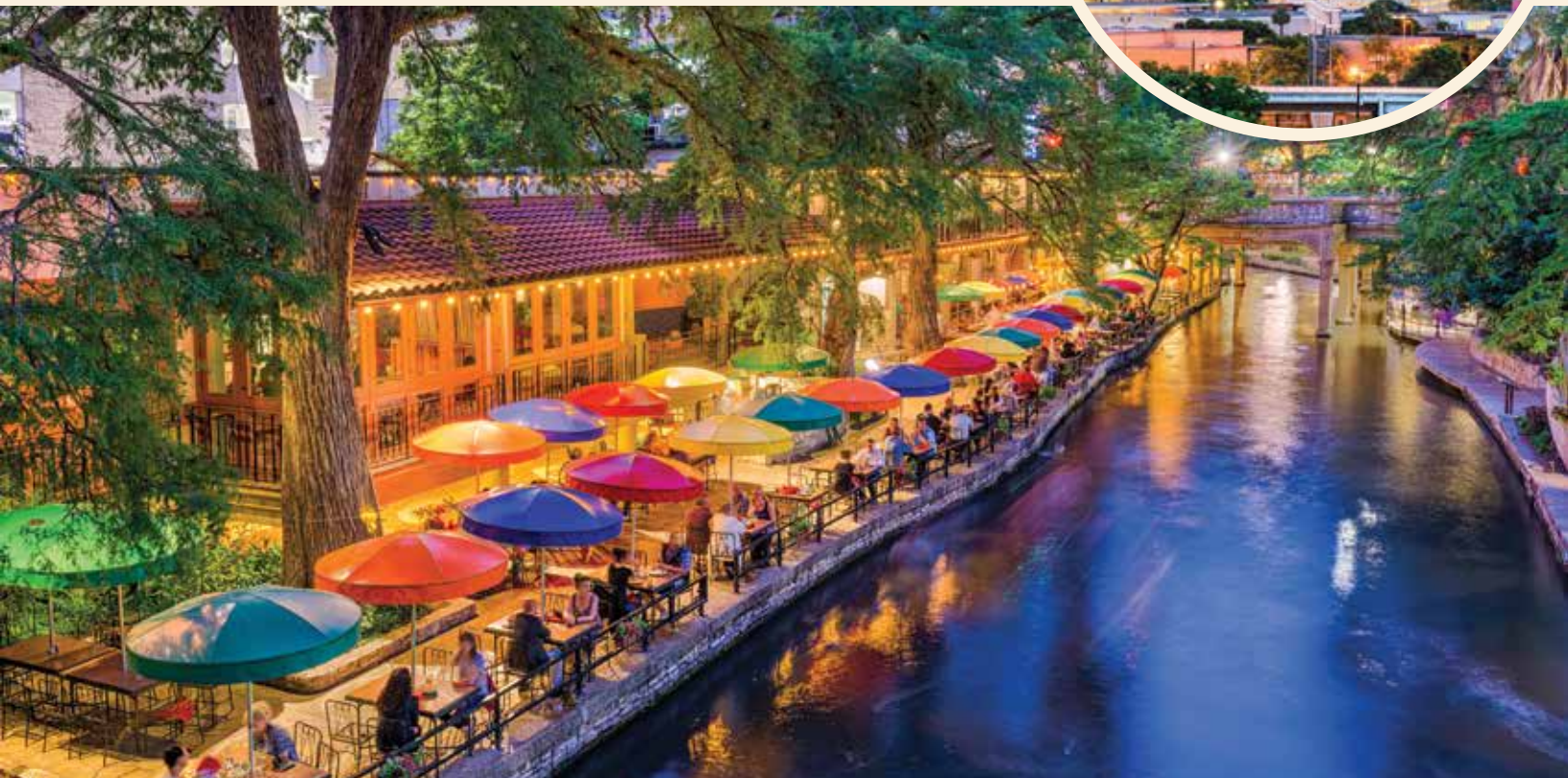
**Hotel reservation deadline:
October 15, 2024**



Join Us in San Antonio!

Known as the “Venice of Texas” for its famous 15 miles of scenic walkways on the San Antonio River, San Antonio provides an authentic experience of the Lone Star state and is sure to have fun for everyone. The San Antonio River Walk is a picturesque urban waterway lined with shops, restaurants and entertainment venues. Take a stroll along the river, enjoy boat tours and dine at charming riverside cafes. You can also journey to the Alamo—an iconic symbol of American history. Visitors can explore the historic mission and learn about the pivotal Battle of the Alamo.

In addition to the Alamo, San Antonio boasts several other historic sites and landmarks, including the Spanish Governor’s Palace, Mission San José and the San Fernando Cathedral. Food enthusiasts will delight in San Antonio’s culinary offerings, which showcase a fusion of Tex-Mex, Southern and international cuisines. From authentic Mexican street food to upscale dining experiences, the city’s restaurants cater to a wide range of tastes and preferences. Don’t miss out on this opportunity to visit one of America’s most diverse cities blending Mexican, Spanish and American heritage.



Before You Leave



Book Your Hotel

Be sure to book your hotel room by October 18, 2024 to receive a lower negotiated rate through the International Foundation. There are three hotels to choose from. All conference activities will take place at the Grand Hyatt San Antonio.



Request Continuing Education Credits

The Annual Conference provides an excellent environment for earning needed continuing education (CE) credit. Request CE credit on conference registration forms at least 60 days prior to the beginning of the conference so that the Foundation can seek preapproval from the governing agency. Due to the approval process by the Chambre de la sécurité financière, insurance CE credit is not available in Québec. Attendees will receive personalized CE attendance slips. For more information, contact the Continuing Education Department at (833) 886-3749, or email continuinged@ifebp.org.



Create Your Personalized Schedule

Build an agenda around your unique interests using the online schedule builder for a custom conference experience. Selecting your sessions in advance also helps us determine room sizes for each session. Make your selections by **October 2** for your chance to win a C\$100 gift card of your choice! **More information to come!**



Download the Conference App

Use the free IFEBP conference app to navigate sessions, find speakers, access handouts, complete session evaluations and more! Please note that the conference app is free, but it is also private, so the passphrase will be made available only to registered attendees at the conference.



While You Are There



Check In at the Registration Desk

When you first arrive, check in at the registration desk with your name. You will receive a badge to wear for the **entire** conference. This QR code will be used to scan you out of **every** session.

Earn Your Certificate of Attendance

A certificate of attendance will be issued to registrants whose attendance can be verified at 12 or more sessions of the conference, beginning with the opening keynote session on Sunday. Be sure to have your badge scanned as you exit each session you attend to ensure you are meeting these requirements.

Earn Continuing Education Credits

If you did not receive personalized CE attendance slips when you checked in, you may request CE credit on site at the conference registration desk and obtain blank forms. All CE forms must be completed properly and submitted at the conclusion of each session. CE forms will not be accepted at any other location, and only one (1) will be accepted for each time period. Badge scanning does NOT qualify for CE credit. Due to the approval process by the Chambre de la sécurité financière, insurance CE credit is not available in Québec. For more information, contact the Continuing Education Department at (833) 886-3749, or email continuinged@ifebp.org.



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Acknowledgements

The International Foundation is grateful to the members of the Canadian Strategic and Program Planning Committee for their guidance in the development of the 57th Annual Canadian Employee Benefits Conference.

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- Hear from four keynote speakers who will challenge and inspire you.
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- Hear about emerging trends and what they could mean for your plans.
- Network with your colleagues and peers.
- Enjoy the beautiful surroundings and cultural attractions San Antonio offers.

