

Canadian **Legal &** **Legislative** Update

May 14-15, 2025

The Fort Garry Hotel | Winnipeg, Manitoba

Preconference: May 13, 2025

Topic: Should Board Members Be Paid or Not?



www.ifebp.org/can-legal

International Foundation
OF EMPLOYEE BENEFIT PLANS  CANADA

Canadian **Legal & Legislative** Update

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The Fort Garry Hotel | Winnipeg, Manitoba

Are your pension and benefit plans fine-tuned to serve your members' most urgent needs?

Attend the Canadian Legal and Legislative Update to learn about the most important developments and trends to help protect your plan members. You will not want to miss the latest updates on need-to-know information.

Who Should Attend

This program is specifically designed for labour and management trustees of multi-employer plans, plan sponsors, public sector pensions and benefits professionals, advisors and service providers looking to keep up with the latest legal and regulatory developments.

Key Takeaways

- Hear from industry experts and practitioners on the latest legal and regulatory developments.
- Focus on the critical information you need to know on current and relevant topics.
- Gain a deeper understanding of the issues affecting the pensions and benefits industry and their impact on your plans.

Register by April 2, 2025 to save C\$300!
www.ifebp.org/can-legal

PROGRAM AT A GLANCE

TUESDAY May 13, 2025	
1:00-4:30 p.m.	Should Board Members Be Paid or Not?
WEDNESDAY May 14, 2025	
8:30-9:30 a.m.	Cross-Country Pensions Update
9:45-10:45 a.m.	Cross-Country Benefits Update
11:00 a.m.-12:00 noon	Navigating New Privacy Standards in the Pensions and Benefits Industry
1:00-2:00 p.m.	Pensions and Benefits Fraud 101
2:15-3:15 p.m.	Legal and Ethical Considerations for Using AI
3:30-4:30 p.m.	A Legal Update on Cybersecurity
4:30-5:30 p.m.	Welcome Reception
THURSDAY May 15, 2025	
8:30-9:30 a.m.	Equity Consideration in Pensions and Benefits Plans
9:45-10:45 a.m.	Prescription Drug Management
11:00 a.m.-12:00 noon	Financial Planning Panel
1:00-2:00 p.m.	The ESG Legal and Regulatory Considerations for Pension Plans
2:15-3:15 p.m.	Forum for Pension Disputes: The Courts, Regulators or Tribunals
3:30-4:30 p.m.	OCIO Legal Oversight

All times are listed in Central Time.

PRECONFERENCE WORKSHOP

Should Board Members Be Paid or Not?

May 13, 2025

1:00-4:30 p.m. CT

Focus on the key elements of compensation for trustees and whether or how trustees may be compensated. This workshop provides a comprehensive overview of reimbursement practices, advantages and disadvantages of board compensation, allowable expenses, considerations to attract and retain board members, and the role of diversity, equity and inclusion (DEI) in shaping compensation policies on trustee boards.

Whether you are a new trustee looking to understand the financial aspects of your role or an experienced board member seeking to stay updated on DEI best practices, this session will provide valuable insights and actionable takeaways to ensure fair and transparent compensation policies in your organization.

Join us for this engaging discussion on trustee remuneration and compensation, and learn how to align financial practices with the values of diversity, equity and inclusion as well as applicable laws and regulatory policies.

Speakers:



Michael Mazzuca,
Managing Partner,
Koskie Minsky LLP,
Toronto, Ontario



Marg Romanow,
RN, CEBS, MTMS,
ICD.D, Q.Arb, Q.Med,
Pension Board Trustee on
Two Jointly Sponsored
Pension Boards,
Regina, Saskatchewan

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with the early registration discount!**

PROGRAM SCHEDULE

All times are listed in Central Time.

TUESDAY | May 13, 2025

12:30-1:00 p.m.

Registration/Information

1:00-4:30 p.m.

Preconference—Should Board Members Be Paid or Not?

4:00-6:00 p.m.

Registration/Information

WEDNESDAY | May 14, 2025

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

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Cross-Country Pensions Update

This session will provide an overview of legislative and case law developments of importance to pension plans across Canada.

WEDNESDAY | May 14, 2025 *(continued)*

9:45-10:45 a.m.

Cross-Country Benefits Update

This session will provide an overview of legislative and case law developments of importance to benefit plans across Canada.

11:00 a.m.-12:00 noon

Navigating New Privacy Standards in the Pensions and Benefits Industry

Canada's pension regulators have introduced new standards that impact pension administrators in terms of the protection and management of personal information of members. Given the real threats plan administrators face in terms of cybersecurity risks and identity theft, both pension and benefit plan administrators should be aware of these regulatory developments.

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

Lunch *(provided)*

1:00-2:00 p.m.

Pensions and Benefits Fraud 101

Learn about types of benefit fraud, how to detect, common schemes, process and techniques to analyze, engaging the authorities, prosecution and restitution.

Key Takeaways:

- Types of benefit fraud and common schemes
- System enhancements to avoid and detect fraud
- What is needed to prosecute and receive restitution

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WEDNESDAY | May 14, 2025 *(continued)*

2:15-3:15 p.m.

Legal and Ethical Considerations for Using AI

As artificial intelligence (AI) continues to revolutionize industries across the globe, its integration into pension and benefit plans presents unique challenges and opportunities. By understanding the regulatory landscape, ethical implications and best practices, participants will be better equipped to leverage AI responsibly and effectively.

3:30-4:30 p.m.

A Legal Update on Cybersecurity

Cybersecurity concerns are not new. Businesses in the pension and benefits space have become targets for threat actors. Is your organization properly addressing the risk? Relevant research and real-life case examples will highlight the key risk exposures to be aware of to keep your plan data safe. This session will also provide an overview of legislation and cyber-insurance.

4:30-5:30 p.m.

Welcome Reception



THURSDAY | May 15, 2025

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

Registration/Information

7:30-8:30 a.m.

Continental Breakfast

8:30-9:30 a.m.

Equity Consideration in Pensions and Benefits Plans

Pensions and benefits plan designs vary significantly from an equity point of view. Learn how different plan provisions may actually create inequity between different generations of workers and offer more or less value to members based on age, service, marital status or even sex.

9:45-10:45 a.m.

Prescription Drug Management

Expenditures on prescription drugs have surpassed spending on physician remuneration to become the second largest cost in the health care system.

This session will explore future trends and legal considerations for plan sponsors and provide insights on how to manage these rising costs effectively and stay compliant with evolving regulations.

11:00 a.m.-12:00 noon

Financial Planning Panel

This panel will explore the critical distinctions between providing financial guidelines and advice to plan members. Attendees will understand the benefits and risks associated with providing or not providing financial wellness resources to plan members.

THURSDAY | May 15, 2025 *(continued)*

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

Lunch *(provided)*

1:00-2:00 p.m.

The ESG Legal and Regulatory Considerations for Pension Plans

This session will focus on recent regulatory developments related to environmental, social and government (ESG) in response to greenwashing as well as the recent anti-ESG sentiment in the U.S. It will discuss the legal, financial and ethical ramifications of removing ESG from investment considerations. Attendees will gain an understanding of the challenges and opportunities that arise as organizations navigate the complexities of ESG related compliance and investment strategies.

2:15-3:15 p.m.

Forum for Pension Disputes: The Courts, Regulators or Tribunals

Learn about the adjudicative bodies that determine pension disputes including regulators, arbitrators, tribunals and the courts. This discussion will explore matters of authority and jurisdiction for the purpose of determining the appropriate forum for dealing with various pension disputes, including those arising under collective agreements, violations of pension legislation and other disputes that have arisen in recent jurisprudence.

- Learn about the relative authority and jurisdiction of adjudicative bodies charged with determining pension disputes.
- Explore relevant considerations in determining which forum to bring a dispute to for adjudication.
- Discuss legal limitations and strategic advantages and disadvantages of having disputes determined in the various forums.

THURSDAY | May 15, 2025 *(continued)*

3:30-4:30 p.m.

OCIO Legal Oversight

Delegating investment tasks to an outsourced chief investment officer (OCIO) has become increasingly common among plan trusts. However, trustees must carefully consider the legal responsibilities and risks associated with outsourcing their plan's investment function. This session will provide a comprehensive overview of these obligations, helping trustees make informed decisions and manage potential risks effectively.

Register by April 2, 2025 to save C\$300!
www.ifebp.org/can-legal



Hear What Your Peers Say About This Program:

“Not only is the conference extremely educational, it’s a great networking opportunity. There are many different plans and trustees out there to learn from; this is an excellent opportunity to garner knowledge from one another and learn from experiences.”

“Great content to understand current leg challenges with pensions and benefits.”

“Absolutely attend. This is one of the most important conferences for trustee education.”

Hotel Information

The Fort Garry Hotel

Reservation deadline: April 14, 2025

Rate: C\$239 single/double occupancy

Taxes and fees (subject to change):
17.25% Room Tax

Resort Fee: None

Nightly Rate Includes: In-room Wi-Fi and access to the fitness center

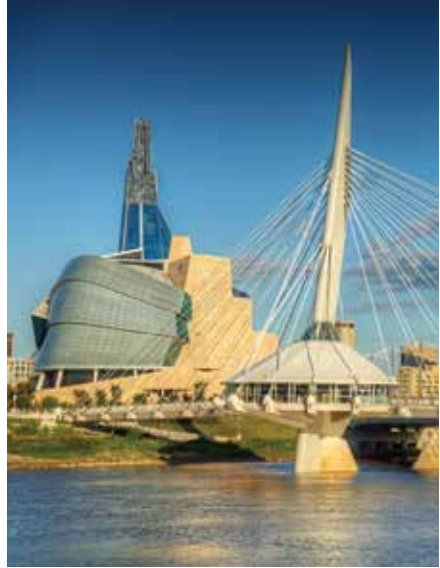
Hotel Cancel Policy: Hotel deposit forfeited for reservations cancelled within 72 hours prior to arrival.

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

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

Hotel Details

The Fort Garry Hotel, a historic landmark in Winnipeg, Manitoba, is a grand railway hotel that has been captivating guests since 1913. Known for its iconic chateau-style architecture, luxurious accommodations and rich history, the hotel offers a blend of old-world charm and modern amenities. With its opulent interiors, including a stunning lobby and elegant dining spaces, the Fort Garry Hotel remains a premier destination for visitors seeking a memorable stay in the heart of the city.



Location Details

Winnipeg, the capital city of Manitoba, Canada, is a vibrant and culturally diverse metropolis located at the confluence of the Red and Assiniboine Rivers. Known as the “Gateway to the West,” Winnipeg boasts a rich history and is home to notable attractions such as The Forks, a popular gathering place with markets and museums, and the Canadian Museum for Human Rights. The city offers a thriving arts scene, diverse culinary experiences and numerous festivals throughout the year, including the famous Winnipeg Folk Festival. With its friendly atmosphere and blend of urban amenities and natural beauty, Winnipeg provides a unique and welcoming experience for residents and visitors alike.

Additional Educational Opportunities

Canadian Public Sector Pensions and Benefits Conference

July 22-23, 2025

Le Westin Montréal
Montréal, Québec

Join leaders from across the country to tackle the unique challenges encountered by the public sector. This program is designed for trustees, administrators, professional advisors and others in the Canadian public sector, including the broader public sector; federal, provincial, municipal, education, university and college, health and community service sectors; and nonprofit organizations.

For more information, visit ifebp.org/canadape.



Canadian Investment Institute

September 8-10, 2025

Delta By Marriott St. John's
Hotel and Conference Centre
St. John's, Newfoundland

Attend the Canadian Investment Institute, and learn from leading-edge investment experts and

economic professionals who provide a strategic mix of investment sessions and opportunities to interact with speakers and your peers. If you are involved in plan investing, this program is a must-attend conference to fully understand the potential available for your fund's future successes.

For more information, visit ifebp.org/canadainvest.

Canadian Trustee Training



The Canadian trustee education path—Foundations of Trust Management Standards (FTMS), Advanced Trust Management Standards (ATMS), Master of Trust Management Standards (MTMS) and MTMS Advanced Leadership Summit—provides clear, cohesive training for all experience levels.

Together, FTMS, ATMS and MTMS provide the ideal blend of knowledge, skills and experience needed for effective management of trusts. Whether you are a new trustee or have been working as one for over ten years, we have trustee training to help you to best serve your plan members.

Foundations of Trust Management Standards (FTMS®)

July 20-21, 2025 | Le Westin Montréal | Montréal, Québec

November 21-22, 2025 | Hilton San Diego Bayfront | San Diego, California

Advanced Trust Management Standards (ATMS™) Sessions A and B

July 20-21, 2025 | Le Westin Montréal | Montréal, Québec

September 6-7, 2025 | Delta By Marriott St. John's Hotel and
Conference Centre | St. John's, Newfoundland

November 21-22, 2025 | Hilton San Diego Bayfront | San Diego, California

Master of Trust Management Standards (MTMS) Sessions A and B

July 24-25, 2025 | Le Westin Montréal | Montréal, Québec

November 21-22, 2025 | Hilton San Diego Bayfront | San Diego, California

MTMS Advanced Leadership Summit

November 23, 2025 | Hilton San Diego Bayfront | San Diego, California

[Learn more at ifebp.org/cdtrusteepath](https://ifebp.org/cdtrusteepath)

Sponsorship Opportunities

Sponsor the Canadian Legal and Legislative Update

Receive brand exposure before, during and after the conference! Canada's increasingly diverse and older workforce composition, the growth in precarious work and rapid technological changes are posing unique challenges for administrators and trustees. Foster meaningful relationships with these representatives from multi-employer funds and the public sector as well as advisors looking to keep up with the latest legal and regulatory developments.

Sponsor Rewards

- Recognition as a conference sponsor on our conference webpage and in preconference promotions
- Your company logo featured on eye-catching sponsor banners and table tents prominently displayed at the conference
- Your company logo, description and contact information for inquiries included in the conference app
- Recognition on large-scale sponsorship "Thank You" slides as part of session introductions
- Option to display your company brochure in our Sponsor Resource Area
- Sponsor recognition on name badges of your company's representatives
- Recognition in the annual full-page "Sponsor Thank-You" ad included in *Plans & Trusts* magazine.
- A FREE six-month company listing (value of \$1,095, if purchased) in our Service Provider Directory, located on the Foundation home page. This online resource is for members in search of new vendors, products and services.

To learn more, please contact Diane Mahler at
(262) 373-7656 or dianem@ifebp.org.



REGISTRATION

Go to www.ifebp.org/can-legal to register.

CONFERENCE REGISTRATION FEES

Preconference

Member early: C\$640 | Member late: C\$790
Nonmember early: C\$750 | Nonmember late: C\$900

Main Conference

Member early: C\$1,560 | Member late: C\$1,860
Nonmember early: C\$1,780 | Nonmember late: C\$2,080
Save C\$300 when you register before April 2, 2025.

REGISTRATION FOR MAIN CONFERENCE INCLUDES

Two continental breakfasts | Two lunches | Beverage breaks | Welcome reception

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. For details, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must register for the program and request CE credit at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2 or email continuinged@ifebp.org.



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



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Topic: Should Board Members Be Paid or Not?

Main Conference: May 14-15, 2025

Sessions Include

- Cross-Country Pensions Update
- Cross-Country Benefits Update
- Navigating New Privacy Standards in the Pensions and Benefits Industry
- Pensions and Benefits Fraud 101
- Legal and Ethical Considerations for Using AI
- A Legal Update on Cybersecurity
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- The ESG Legal and Regulatory Considerations for Pension Plans
- Forum for Pension Disputes: The Courts, Regulators or Tribunals
- OCIO Legal Oversight

Visit www.ifebp.org/can-legal to register, or call (833) 886-3749 for more information.

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