

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



**May 15-16, 2024**

The Westin Nova Scotian  
Halifax, Nova Scotia

**New for 2024**

Preconference: May 14, 2024

Topic: **Board Succession Planning**



*Navigating  
Your Course*

International Foundation  CANADA  
OF EMPLOYEE BENEFIT PLANS

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[www.ifebp.org/can-legal](http://www.ifebp.org/can-legal)

# PRECONFERENCE WORKSHOP

## Board Succession Planning... Not Your Problem? It Should Be. Let's Make a Plan.

**May 14, 2024**

1:00-5:00 p.m. AT

Building and maintaining a positive board culture takes intention and effort. This process can be more challenging when faced with board turnover, especially if it is unexpected. With the increase in board trustee turnover and retirements over the last few years, and many more likely to follow, how are you and your board preparing to transition to the next generation of trustees?

In this workshop, you will learn a step-by-step approach to succession planning, including how to find new trustees. Effective interview questions will be provided to ensure desired skills and attributes. We will detail how to amend trust agreements and/or collective agreements to support succession planning for trustees as well as how to address bias and culture on existing boards and with new trustees.

This workshop will also discuss:

- The advantages of succession planning, including avoiding disruptions and delays on important board work as well as ensuring new trustees are well prepared and properly educated
- Engaging your board in the trustee appointment process
- The importance of developing a skills matrix
- Policies to address terms, outline roles and responsibilities, and remove board members
- Responsibilities of appointing parties
- Ensuring proper diversity
- Seeking approval and provisions for alternate trustees and trustees-in-training
- The difficulty in recruiting management trustees
- Professional trustees
- Board self-assessments.

**Separate Registration Required**

# Canadian **Legal & Legislative** Update

**May 15-16, 2024**

The Westin Nova Scotian | Halifax, Nova Scotia

**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 3, 2024 to save C\$300!**  
[www.ifebp.org/can-legal](http://www.ifebp.org/can-legal)

# Canadian Legal & Legislative Update

All times are listed in Atlantic Time.

## PROGRAM AT A GLANCE

<b>TUESDAY   May 14, 2024</b>	
<b>1:00-5:00 p.m.</b>	Preconference: Board Succession Planning... Not Your Problem? It Should Be. Let's Make a Plan.
<b>WEDNESDAY   May 15, 2024</b>	
<b>8:30-9:30 a.m.</b>	Cross-Country Benefits Update
<b>9:45-10:45 a.m.</b>	Cross-Country Pensions Update
<b>11:00 a.m.- 12:00 noon</b>	Key Employment Considerations for the Canadian and Québec Workforce
<b>1:00-2:00 p.m.</b>	Medical Assistance in Dying
<b>2:15-3:15 p.m.</b>	Navigating the Future: Emerging Trends in Pensions and Benefits in Canada
<b>3:30-4:30 p.m.</b>	It Is Time to Retire the Concept of Retirement
<b>4:30-5:30 p.m.</b>	Welcome Reception
<b>THURSDAY   May 16, 2024</b>	
<b>8:30-9:30 a.m.</b>	SMEP and ELHT Tax Rules: Where to From Here?
<b>9:45-10:45 a.m.</b>	Developing a Useful Pension Plan Risk Framework
<b>11:00 a.m.- 12:00 noon</b>	Cyber Reality—Don't Be an Ostrich With Your Head in the Cyber Sand
<b>1:00-2:00 p.m.</b>	Key Areas of Pension Disputes in 2023/2024
<b>2:15-3:15 p.m.</b>	Balancing Fairness and Sustainability in Pension Plans
<b>3:30-4:30 p.m.</b>	Collecting Money Owed to Pension and Benefit Plans— Why and How?

## Tuesday | May 14, 2024

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*All times are listed in Atlantic Time.*

12:30-1:00 p.m.

### **Registration/Information**

1:00-5:00 p.m.

### **Preconference—Board Succession Planning... Not Your Problem? It Should Be. Let's Make a Plan.**



**Chris A. Camp, CEBS, MTMS**

Chair

Halifax Professional Firefighters Benefits Trust

Halifax, Nova Scotia



**Marg Romanow, R.N., CEBS,  
MTMS, ICD.D, Q.Arb, Q.Med**

Pension Board Trustee

Regina, Saskatchewan

4:00-6:00 p.m.

### **Registration/Information**

## Wednesday | May 15, 2024

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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 Benefits Update**

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

## Wednesday | May 15, 2024 *(cont.)*

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9:45-10:45 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.

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

### **Key Employment Considerations for the Canadian and Québec Workforce**

- Dissect the impact of Bill C-13 and the Charter of the French Language as well as how they both shape the Canadian employment, pensions and benefits landscape.
- Understand the implications of employment law, pensions and benefits on leaves of absence under both the common and civil law.
- Manage pension and benefit entitlements during leaves of absence to avoid allegations of constructive dismissal.

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

### **Lunch (provided)**

1:00-2:00 p.m.

### **Medical Assistance in Dying**

In recent years, Canada has allowed medical assistance in dying (MAiD) for those with irremediable illnesses causing lasting physical or psychological impairment, even if death isn't foreseeable. While legislation has been passed to extend MAiD to individuals solely diagnosed with a mental illness, its implementation is delayed. When mental health provisions take effect, questions arise about insurers covering death benefits for depression or PTSD-related deaths. Additionally, there's uncertainty about employers/worker-injury programs covering death benefits for work-related fatalities.

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**[www.ifebp.org/can-legal](http://www.ifebp.org/can-legal)**

## Wednesday | May 15, 2024 *(cont.)*

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2:15-3:15 p.m.

### **Navigating the Future: Emerging Trends in Pensions and Benefits in Canada**

This engaging session is designed to equip you with a comprehensive understanding of the latest developments, ensuring you stay ahead in the ever-evolving world of employee benefits.

3:30-4:30 p.m.

### **It Is Time to Retire the Concept of Retirement**

Delve into the necessary changes to empower a modernized retirement approach, including a comprehensive examination of the legal landscape. Addressing societal challenges such as ageism and gender inequalities in pensions, this session aims to reshape how we guide members towards a more holistic future by revolutionizing the way we prepare for life beyond traditional working years.

4:30-5:30 p.m.

### **Welcome Reception**

## Thursday | May 16, 2024

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

### **Registration/Information**

7:30-8:30 a.m.

### **Continental Breakfast**

8:30-9:30 a.m.

### **SMEP and ELHT Tax Rules: Where to From Here?**

This session will dissect the implications of the spring federal budget on employee benefits, focusing on the Canada Revenue Agency's (CRA) specified multi-employer plan (SMEP) and employee life and health trusts (ELHTs). This session will also explore the changes, challenges and opportunities arising from the latest budgetary developments, providing you with the knowledge needed to navigate the evolving tax landscape.

## Thursday | May 16, 2024 *(cont.)*

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9:45-10:45 a.m.

### **Developing a Useful Pension Plan Risk Framework**

Examine the essential components of risk management, guided by an introduction to the CAPSA Guidelines. Engage in meaningful discussions around benefits risks and participate in a case study to solidify your understanding and application of these principles.

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

### **Cyber Reality—Don't Be an Ostrich With Your Head in the Cyber Sand**

Cyber risk is a top risk faced by all pension plan administrators. When you are hacked, data can be lost, retiree payroll may be missed and the security of funds may be at issue. When faced with a cyber event, will you have contemporaneous evidence of cyber due diligence? What should be the key elements of your cyber program? What questions should you ask in addressing this key pension plan risk?

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

### **Lunch (provided)**

1:00-2:00 p.m.

### **Key Areas of Pension Disputes in 2023/2024**

As the pension landscape evolves, understanding the nuances in key areas becomes paramount. The session is designed to address the pressing issues of 2023/2024. Join us for an exploration of the challenges surrounding asset transfers, marital breakdowns, reducing accrued benefits and changing contribution rates for members on LTD as well as the unique considerations of an Alberta Pension Plan.

**Register by April 3, 2024 to save C\$300!**  
**[www.ifebp.org/can-legal](http://www.ifebp.org/can-legal)**



## Thursday | May 16, 2024 *(cont.)*

2:15-3:15 p.m.

### **Balancing Fairness and Sustainability in Pension Plans**

As the landscape of pension plans evolves, ensuring fairness and sustainability becomes paramount. This session will educate employers and trustees on emerging challenges to fairness and sustainability for a variety of plan types, including defined benefit plans, negotiated cost plans and target benefit plans. Special attention will be given to indexation of benefits in the context of high inflation.

3:30-4:30 p.m.

### **Collecting Money Owed to Pension and Benefit Plans— Why and How?**

- Understand the key legal differences between funds owed to trusts and funds owed to other creditors.
- Explore the ethical boundaries of collection activities against plan participants.
- Learn how to build an effective collections program.

## Sponsorships Available

Receive brand exposure before, during and after the conference! To learn more, please contact Diane Mahler at (262) 373-7656 or [dianem@ifebp.org](mailto:dianem@ifebp.org).



# Hotel Information



## The Westin Nova Scotian

**Reservation deadline:** April 5, 2024

**Rate:** C\$229 single/double occupancy

**Taxes and fees (subject to change):** 3% hotel levy and 15% HST

**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 Westin Nova Scotian is an elegant and upscale hotel located in the heart of downtown Halifax, offering a blend of modern comforts and historic charm. With its convenient waterfront location, it provides guests easy access to popular attractions, business centres and a variety of dining options. The hotel boasts well-appointed rooms, exceptional service and a tranquil atmosphere for a memorable stay in Nova Scotia's capital city.

## Location Details

Halifax, located in eastern Canada, is the provincial capital of Nova Scotia. A city on the sea, Halifax is also known for Citadel Hill, a star-shaped fort that was originally built as military fortification to protect the city from enemies. Citadel Hill is now a popular attraction that features tours as well as its Solider for a Day program. Other attractions include downtown Halifax, Pier 21 and the Maritime Museum of the Atlantic.

## REGISTRATION

Go to [www.ifebp.org/can-legal](http://www.ifebp.org/can-legal) to register.

### CONFERENCE REGISTRATION FEES

#### *Preconference*

Member early: C\$525 | Member late: C\$675  
Nonmember early: C\$635 | Nonmember late: C\$785

#### *Main Conference*

Member early: C\$1,525 | Member late: C\$1,825  
Nonmember early: C\$1,745 | Nonmember late: C\$2,045  
Save C\$300 when you register before April 3, 2024.

## 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](http://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.



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



# Canadian Legal & Legislative Update

**Preconference:** May 14, 2024

Topic: Board Succession Planning

**Main Conference:** May 15-16, 2024

## Sessions Include

- Cross-Country Benefits Update
- Cross-Country Pensions Update
- Key Employment Considerations for the Canadian and Québec Workforce
- Medical Assistance in Dying
- Emerging Trends in Pensions and Benefits in Canada
- It Is Time to Retire the Concept of Retirement
- SMEP and ELHT Tax Rules
- Developing a Useful Pension Plan Risk Framework
- Cyber Reality
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- Collecting Money Owed to Pension and Benefit Plans—Why and How?

**Register by April 3, 2024 to save C\$300  
with the early registration discount!**

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

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