

Advance Strategic Planning: Providing Pension & Benefits Advice In 2015



Date: Thursday, February 5, 2015 | 1:30 pm - 4:50 pm

Location: Westin Harbour Castle Conference Centre, 2 Harbour Square This program is eligible for up to 3.25 Substantive Hours

Program Chairs: Danelle Parkinson, Ontario Pension Board
Anne Slivinskas, Ontario Teachers' Pension Plan Board

"An ounce of prevention is worth a pound of cure": In our profession, this means that providing thoughtful and proactive advice on the law governing pensions and benefits *now* can go a long way in helping clients avoid problems in the future. Ensure that you have the tools you need to be a trusted advisor for plan sponsors and administrators on strategic plan design, managing errors, and providing member communications in the future. Plus, hear about the latest developments in employee benefits law and executive compensation and the advice you should be giving your clients.

1:30 pm Welcome and Opening Remarks

3:10 pm **Employee Benefits and Executive Compensation**

1:35 pm **Advising Sponsors: Avoiding Trapped Surplus**

Randy Bauslaugh, McCarthy Tétrault LLP

Deron Waldock, Aon Hewitt

Positive investment returns and plan design changes will hopefully lead to surplus for many pension plans in 2015. Find out the steps that plan sponsors can take now to ensure any surplus funds are not trapped.

Nadine Côté, CSuite Law

Karen Millard, Towers Watson

Get up to speed on the new developments in the management of disability plans including new obligations to insurers, privacy considerations in managing claims and the impact of the *Accessibility for Ontarians with Disabilities Act (AODA)*. Learn about recent hot topics in executive compensation and governance, including the recent impetus to enhance board diversity.

2:15 pm **E-Pensions 101: Advising Plan Administrators on Member Communication**

Evan Howard, Colleges of Applied Arts and Technology (CAAT) Pension Plan

Lisa Mills, Hicks Morley Hamilton Stewart Storie LLP

As a result of recent legislative changes, plan administrators must plan for new communication requirements, including statements to former and retired members. Discover the innovative methods plan administrators are developing to communicate to members electronically. Make sure that you understand the new statutory requirements and are prepared to provide advice on the CAPSA Electronic Communication Guidelines.

4:00 pm **Correcting Errors**

Jeff Boxer, Manager, Actuarial and Policy Division at Canada Revenue Agency

David Stamp, Osler Hoskin & Harcourt LLP

Be prepared to advise your clients on how to manage errors, including plan design blunders, enrolment inaccuracies, benefit miscalculations, and contributions in error.

2:55 pm Networking Break

4:40 pm Questions and Concluding Remarks

4:50 pm Program Concludes

Questions? Toll Free: 1-800-668-8900 | Tel: 416-869-1047 | pd@oba.org



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