

The Increasing Importance of Pensions and Benefits - Key Strategies for Complex Problems



Date: Friday, February 7, 2014 | 9:00 am - 12:20 pm

Location: Westin Harbour Castle Conference Centre, 2 Harbour Square

Program Chairs: **Kim A.D. Ozubko**, Blake Cassels & Graydon LLP
Danelle A. Parkinson, Ontario Pension Board

This program contains 0.0 Professionalism Hour.

This program is eligible for up to 3.25 Substantive Hours.

Rarely a day goes by without another development in the area of pensions and employee benefits. From regulatory reform to the impact of pensions on government spending and sustainability, pensions and benefits issues have risen to the forefront of Canadian and global business agendas. This 2014 Institute program, which includes prominent experts in the fields of pensions and benefits law, is a must attend session. Join us as we discuss the sustainability of pension plans across Canada, recent changes to the *Pension Benefits Act* (Ontario) and the latest developments in employee benefits law and plan administration.

9:00 am **WELCOME AND INTRODUCTION**

9:05 am **UNDERSTANDING PENSION PLAN ASSET TRANSFERS**

- The new rules and what they mean for plan sponsors and members
- What still needs to change

Jeremy J. Forgie, Blake, Cassels & Graydon LLP

Murray A. Gold, Koskie Minsky LLP

9:45 am **WHAT'S NEW IN PLAN ADMINISTRATION?**

Learn why pension plan administration is like a law school exam as we walk through the trials and tribulations of a plan administrator.

Gareth Gibbins, OMERS Administration Corporation

Karen M. Kahansky, Senior Consulting Lawyer, Towers Watson

Leanne M. Hull, BMO Financial Group

10:45 am **NETWORKING BREAK**

11:00 am **ASSESSING RECENT DEVELOPMENTS IN EMPLOYEE BENEFITS**

- What's new in employee benefits?
- A discussion of deferred income plan anti-avoidance rules
- Trading off compensation for health or flex credits
- Qualifying expenses under a private health services plan
- Taxation of group sickness or accident premiums

Larry J. Swartz, Morneau Shepell Ltd.

Marcel J.R. Theroux, Mercer (Canada) Limited

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



- 11:25 am **PLAN SUSTAINABILITY: ALTERNATIVES ACROSS CANADA**
- Sustainability issues facing pension plans
 - Pension plan alternatives – What works and what doesn't
 - Where do we go next?
- Randy V. Bauslaugh**, McCarthy Tétrault LLP
Ian Edelist, Eckler Ltd.
Jana Steele, Osler, Hoskin & Harcourt LLP

12:10 pm **QUESTIONS AND CONCLUDING REMARKS**

12:20 pm **PROGRAM CONCLUDES**

Register at oba.org/institute2014

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