



2024 ACPM
**NATIONAL
CONFERENCE**

GLOBAL INSIGHTS CANADIAN IMPACT



Cultivating Retirement Success

CONFERENCE PROGRAM

SEPTEMBER 24–26, 2024

KELOWNA, BC

Delta Hotels Grand Okanagan Resort



DIAMOND SPONSOR



Investor
Services

**SEPTEMBER
24–26, 2024**
KELOWNA, BC
Delta Hotels
Grand Okanagan Resort



GLOBAL INSIGHTS CANADIAN IMPACT

Cultivating Retirement Success



Join us as we delve into the world of retirement income management at this year's **ACPM National Conference "Global Insights, Canadian Impact: Cultivating Retirement Success"**. Drawing upon the deep experience and insights of our speakers, we'll navigate through the triumphs and challenges that define Canada's pension landscape, all while gaining invaluable perspectives from global success. Together, let's ignite a dialogue on increasing workplace pension coverage and improving outcomes to create a brighter retirement for more Canadians.

WELCOME TO KELOWNA!

In the heart of the stunning Okanagan Valley, Kelowna is situated along the beautiful shores of Okanagan Lake, surrounded by mountains, lakes and vineyards. Located on the traditional, ancestral territory of the Syilx/Okanagan people, the city's name originates from the Syilx First Nations word for grizzly bear. The region is known for its wineries, fruit orchards, and vibrant arts and culture scene, and its diverse economy includes a mix of industries such as agriculture, manufacturing, retail trade, construction, technology, healthcare and tourism. The Okanagan Valley is a semi-arid climate, boasting long warm summers and short mild winters. September is a perfect time to visit the Okanagan Valley, with an average daily high of 22 degrees Celsius. The temperate climate, clear skies, and stunning Okanagan scenery make a beautiful canvas for the array of fall colours.

Join us in Kelowna September 24–26 where you will take in the natural landscape of this undiscovered gem!

**TUESDAY
SEPTEMBER 24**



7:30 AM – 2:30 PM

**GOLF AT THE
HARVEST GOLF CLUB**

Established in 1994, The Harvest Golf Club has become renowned for its natural beauty, exceptional golf and impressive amenities. At 7,109 yards, The Harvest boasts a championship-length, 18-hole golf course nestled within the natural beauty of the Okanagan. Wide fairways, amazing walkability, breathtaking panoramic views and over 800 fruit trees decorating the fairway make this parkland course unique. Carved through fruit orchards, several acres of the property remain devoted to working apple and wine grape orchards. It's an opportunity for colleagues and friends to get together, network, and enjoy each other's company through a round of golf on a truly awe-inspiring course.

Registration includes green fees, travel to/from the hotel, continental breakfast and lunch.

12:00 PM – 8:00 PM

REGISTRATION / INFORMATION DESK — DELTA GRAND OKANAGAN

6:30 PM – 8:00 PM

**WELCOME RECEPTION
(DELTA GRAND OKANAGAN)**

Welcome! The National Conference kicks off with the official Welcome Reception at the Delta Hotel Grand Okanagan Resort. Gather with your pension and retirement income industry colleagues and friends, all while taking in the fall colours, pleasant temperatures and breathtaking views of Okanagan Lake — maybe you'll even get a glimpse of the Ogopogo! It's the perfect way to begin your conference experience and meet other delegates. *We look forward to your presence!*

WEDNESDAY

SEPTEMBER 25



7:00 AM – 5:00 PM

7:30 AM – 8:30 AM

8:35 AM – 8:45 AM

8:45 AM – 10:00 AM
PLENARY I

REGISTRATION / INFORMATION DESK — DELTA GRAND OKANAGAN

BREAKFAST

WELCOME AND OPENING REMARKS

GEOPOLITICS AND THE IMPACT ON CANADIAN PENSION MANAGERS

Geopolitical events are unfolding with increasing frequency, exerting profound effects on the global economy. This session is designed to examine pivotal geopolitical developments, their ramifications for the global economic landscape, and their influence on the decision-making processes of Canadian pension managers.

Our discussions will span a variety of critical incidents, encompassing the U.S. presidential election, U.S. and international fiscal and monetary policies and rising international tensions.

SPEAKERS

ANDREW BISHOP, *Signum Global Advisors*

JIM GILLILAND, *Leith Wheeler Investment Counsel*

MODERATOR

ERWAN PIROU, *Aon*

10:00 AM – 10:30 AM

REFRESHMENT BREAK / SPONSOR SHOWCASE





WORKSHOP 1

Navigating Data Governance, Security and the Legal Landscape for Pension Plans

This workshop brings together experts that will navigate through data security, governance and legal considerations. Learn best practices for safeguarding sensitive data, including utilizing concepts like data catalogue and lineage. Discover actionable insights to enhance internal controls and mitigate risks. Our legal expert will address recent developments affecting pension data governance, compliance challenges and adapting to evolving standards. Join us for an engaging session that will equip you with essential knowledge for ensuring data security, compliance, and effective governance within pension plans.

SPEAKERS

MARIE-ALEXANDRE MAILLOUX, *Desjardins*

QAHIR RAJWANI, *Healthcare of Ontario Pension Plan*

MODERATOR > **LISA CHAMZUK**, *Lawson Lundell LLP*

WORKSHOP 2

Climate Change, ESG: How Boards Manage Future Risks

As climate change and ESG considerations add to the complexity of board governance, many pension boards are grappling with how to manage the future risks that will come with changing regulations and evolving expectations. This panel workshop will offer some practical answers on how to get started on incorporating climate change and ESG into investment policies and other board governance practices. Hear from a consulting expert at SHARE and from board members who have been working through the process with their own boards to prepare for current and future risks.

SPEAKERS

CHELSEA KITTLESON, *British Columbia Municipal Pension Plan*

BRIAN MINNS, *University Pension Plan*

SHANNON ROHAN, *Shareholder Association for Research and Education (SHARE)*

MODERATOR > **SHERI WRIGHT**, *Special Forces Pension Plan (SFPP)*

10:30 AM – 11:30 AM
CONCURRENT
WORKSHOPS

11:45 AM – 1:30 PM
WEDNESDAY LUNCHEON
AND CENTRE STAGE

The ACPM Executive Committee is in the house!

This year's Centre Stage will be addressing your issues of concern and give you a sneak peek of what's on the horizon for ACPM. With changes in global, national and provincial outlooks changing with increasing frequency, Centre Stage will look at today's challenges and tomorrow's opportunities. This is your time to highlight the issues of the day that will help us develop future policy positions!



1:45 PM – 3:00 PM
PLENARY II

EXPLORING GLOBAL SUCCESS TO INSPIRE CANADA'S FUTURE

Join us as we dive into the world of pension management. Drawing upon rich insights from CEM Benchmarking and the Mercer CFA Institute Global Pension Index, we'll navigate through the triumphs and challenges that define Canada's pension landscape, all while gaining invaluable perspectives from global success. Together, let's ignite a dialogue on increasing workplace pension coverage and improving outcomes to create a brighter retirement for more Canadians.

SPEAKERS

SHANNAN COREY, *Saskatchewan Pension Plan*

LILACH FRENKEL, *CAAT Pension Plan*

DAVID KNOX, *Mercer*

MODERATOR

CHRIS FLYNN, *CEM Benchmarking*



3:00 PM – 3:30 PM

3:30 PM – 4:30 PM
CONCURRENT
WORKSHOPS

REFRESHMENT BREAK / SPONSOR SHOWCASE

WORKSHOP 3

Good Governance in Action

Effective governance forms the cornerstone of every successful pension plan. Yet, as the complexity of governance increases and regulatory requirements evolve, it is imperative for Trustees and Administrators to continually adapt their governance practices to fulfill their fiduciary responsibilities effectively. This session aims to delve into governance best practices, examining both theoretical frameworks and practical applications.

SPEAKERS

TERRY DUGGAN, Retired President of BC Maritime Employers Association and Trustee of the Waterfront Industry Pension Plan

GORDON GIBBONS, retired Principal, Leith Wheeler Investment Counsel

JEREMY PHILLIPS, Planner

MODERATOR > **STACEY PARKER-YULL**, Medicus Pension Plan

WORKSHOP 4

Regulators Roundtable: The Now and the Future of Pension Regulation

Haripaul Pannu, Deputy Superintendent of Pensions in Alberta, Joy Tcheng at BCFA, and Leah Fichter from Saskatchewan Financial Services Commission will be in the “hot seats” to discuss the issues that are on plan administrator’s minds relating to CAPSA initiatives and developments in their jurisdictions and how pension regulation and policy-making will evolve.

SPEAKERS

LEAH FICHTER, Saskatchewan Financial Services Commission

HARIPAUL PANNU, Alberta Finance

JOY TCHENG, BC Financial Services Authority

MODERATOR > **ROBIN DAMM**, WTW

6:00 PM – 9:30 PM
WEDNESDAY
EVENING
RECEPTION,
DINNER,
and POST-SOCIAL



TIM NUTT has been masterfully blending humor into stories and jokes, captivating audiences for over two decades. His comedic genius elevates the art to new heights and realms, finding the funny in the mundanity of daily life through his innovative ideas and peculiar perspectives. With a blend of sharp one-liners and intricate narratives, Tim entertains and amuses. His comedy journey includes remarkable escapades and appearances at prestigious comedy festivals worldwide, such as the *Edinburgh Comedy Festival*, *Montreal's JUST FOR LAUGHS*, *Halifax's HA Comedy Festival*, and *The Winnipeg Comedy Festival*, among others. Drawing comparisons to comedic legends like Billy Connolly and George Carlin, Tim stands out as an adept storyteller and performer, offering audiences an exceptional show that is bound to delight.



REGISTRATION / INFORMATION DESK — DELTA GRAND OKANAGAN

BREAKFAST

7:30 AM – 4:30 PM

7:45 AM – 8:45 AM

8:45 AM – 10:00 AM
PLENARY III

MODERNIZING ASSET ALLOCATION IN TODAY'S CHALLENGING WORLD

Building and maintaining a sustainable pension plan asset allocation in today's market environment can be daunting. As a plan sponsor or board member, you may be involved in navigating economic uncertainties, technological advancements, and global shifts. What strategies might you apply to ensure the future interest of plan members is being met? In this session, we will first have an overview of the macro economic global view and the current landscape in which all pension plans are operating within. We will hear from a speaker who will focus in on the climate risk considerations. Finally, a plan sponsor will share their experience and approach to strategies applied in their asset allocation discussions.

SPEAKERS

AMR ADDAS, *Farm Credit Canada and Canada Climate Law Initiative*

CAROLE FIELD, *CPKC*

DOMINIQUE LAPOINTE, *Manulife Investment Management*

MODERATOR

TODD SAULNIER, *Mercer*

10:00 AM – 10:30 AM

REFRESHMENT BREAK / SPONSOR SHOWCASE

10:30 AM – 11:30 AM
CONCURRENT
WORKSHOPS

WORKSHOP 5

Social Security Sustainability: CPP and APP

A panel discussion on the potential impact to the sustainability of the Canada Pension Plan if Alberta were to withdraw and create an Alberta Pension Plan. Discussion includes:

- Sustainability of CPP, what does the valuation say about the sustainability of the plan currently?
- What would change for Canada's social security pension programs if one or more plan sponsors withdrew from the plan?
- How do the numbers add up?

SPEAKERS

BOB BALDWIN, *C.D. Howe Institute*

TREVOR TOMBE, *University of Calgary*

JILL WAGMAN, *Eckler*

MODERATOR

HUGH WRIGHT, *Miller Thomson*

WORKSHOP 6

CAP Governance: A Conversation

Join us for an open and lively discussion with three engaging speakers with a wealth of experience in the CAP space. The DC landscape has certainly evolved over the last 20 years — since the publication of the original CAP Guidelines back in 2004 — and there is much to consider from a governance and member engagement standpoint.

Our speakers will touch on a variety of topics, including but not limited to:

- Best practices for DC plans
- Discussion of the duties of the plan administrator
- Evolution of the CAP guidelines and what may come from updates

SPEAKERS

RENÉ BEAUDRY, *Normandin Beaudry*

ELEANOR MARSHALL, *Bell Canada*

MICHELLE PESHKO, *Glencore*

MODERATOR

SEAN MAXWELL, *Blake, Cassels & Graydon LLP*



11:45 AM – 1:30 PM

THURSDAY LUNCHEON AND LEGAL UPDATE

Legal Perspectives 2024 – 25

Welcome to a highly informative session on current and future legal issues, policy and legislation affecting retirement income in Canada. Our panel of legal experts from across Canada will provide their perspectives and expertise on how these legal developments will impact retirement plan administration and governance now and in the future.

SPEAKERS

KENNETH BURNS, *Lawson Lundell LLP*

ROSS GASCHO, *Fasken Martineau DuMoulin LLP*

JULIEN RANGER, *Osler, Hoskin & Harcourt LLP*

MODERATOR › **SUSAN NICKERSON**, *McCarthy Tétrault LLP*

1:45 PM – 2:45 PM

CONCURRENT WORKSHOPS

WORKSHOP 7

Navigating the Artificial Intelligence Frontier

Join us for a dynamic workshop on getting AI-ready. In today's fast-paced world, organizations can't afford to ignore AI's rapid evolution. Our expert speakers will share practical experiences and invaluable insights, while guiding you through the broad AI landscape. Don't miss this chance to equip yourself and your organization for success in the age of AI.

SPEAKERS

NATE HAWS, *Linea Solutions*

DAVE KEIRSTEAD, *Sun Life*

MODERATOR › **MIKE SRDANOVIC**, *Northern Trust*

WORKSHOP 8

Turning Turmoil to Advantage —

Opportunities for Pension Plans to Update Plan Strategies

Murray Wright from TELUS Health will discuss the market developments (interest rates, inflation, annuity markets) in the recent past and how they have changed the outlook of pension plans and created new challenges and opportunities for them. There will be a moderated discussion with our three panelists, Mark Guiton, CEO of IWA-Forest Industry Pension Plan, Richard Beed, VP People & Culture of Vancouver Airport Authority and Ryan Kastner, Chief Business Development Officer at Brookfield Annuity Company on their recent experience with analysis on funding and benefit policy and derisking options for pension plans in this changing economic market.

SPEAKERS

RICHARD BEED, *Vancouver Airport Authority*

MARK GUITON, *IWA-Forest Industry Pension Plan & LTD Plan*

RYAN KASTNER, *Brookfield Annuity Company*

MODERATOR/SPEAKER › **MURRAY WRIGHT**, *TELUS Health*

2:45 PM – 3:15 PM

REFRESHMENT BREAK / SPONSOR SHOWCASE



3:15 PM – 4:15 PM SPOTLIGHT ON... CHANTAL HÉBERT

One of Canada's top political journalists, **CHANTAL HÉBERT** is a national affairs writer with the *Toronto Star*. She is also a weekly participant on the political panel *At Issue* on the CBC's *The National* as well as Radio-Canada's *Les Coulisses du pouvoir*.

A highly respected and influential columnist and political commentator, Ms. Hébert has an extensive understanding of political issues along with her commitment and interest in public policy. She was invested as an Officer of the Order of Canada in 2012.



4:15 PM – 4:30 PM

CLOSING CEREMONIES

7:00 PM – 8:00 PM GALA RECEPTION

DELTA HOTELS GRAND OKANAGAN RESORT

Celebrate the official ending of the conference with a final opportunity to meet up with your new friends and connections overlooking beautiful Lake Okanagan. Relax and reflect with colleagues on all that you've learned over the past three days. Then, head into the Okanagan Ballroom for a wonderful evening of sumptuous food and lively entertainment.

8:00 PM – 10:00 PM GALA DINNER and ENTERTAINMENT

Ignite your senses and take your conference experience to new heights on Thursday evening with the unparalleled musical talents of **DJ SPINALSHIFT**. Celebrated for his electrifying presence and expert mixing skills, DJ Spinalshift seamlessly blends genres and eras, promising a musical journey like no other. Whether you're a fan of classic hits or the latest chart-toppers, his versatile, curated playlists are guaranteed to keep you on your toes and the dance floor buzzing. Join us for a five-star musical journey where beats, melody, and rhythm collide. Don't miss this chance to unwind, connect and create lasting memories with your colleagues.





ADDITIONAL INFORMATION



A SPECIAL THANK YOU TO OUR VALUED SPONSORS

We wish to express our sincere appreciation to all of our Sponsors. It is with their valuable support that ACPM has consistently been able to offer exceptional programming for conference delegates year after year.

Please take the time to meet our Sponsor representatives throughout the conference and feel free to join us in saying:

"Thank you for making it happen!"

*A special Thank You to our
DIAMOND SPONSOR*



Investor
Services

CONFERENCE HOTEL

The 2024 ACPM National Conference host hotel is the Delta Hotels Grand Okanagan Resort in Kelowna, British Columbia. All registration and conference sessions will take place at the hotel. Delegates are responsible for making their own arrangements. Please visit the ACPM Conference website (acpm.com) for complete hotel details and information on guestroom reservations.

ATTIRE

The dress code for the conference is business casual. The Wednesday night events are casual. Business/dinner attire is optional but recommended for the Thursday Gala events.

CONFERENCE ID

Conference ID Badges must be worn to all Conference-related activities. ID Badges will be required for entry to all business and social activities for Delegates. Please do not lend your ID Badge to anyone. If your ID Badge is misplaced, please proceed to Registration as soon as possible.

DIETARY CONCERNS AND DELEGATE LUNCHEONS

Any dietary concern must be included on the registration form during registration. Any dietary concerns reported during the conference might not be accommodated. Delegate luncheons are part of the general conference program and are available only to registered Delegates.

CONTINUING EDUCATION

ACPM will issue certificates of attendance for all sessions that may be submitted by delegates for CPD hours. For additional information, please contact your professional association.

PLENARY SESSIONS AND WORKSHOPS

We have an informative and valuable program planned for you. To stay on time, and in respect for speakers and presenters, we request that you arrive at Plenary and Workshop sessions and that you take your seat several minutes in advance of the opening remarks. You may attend the Workshop of your choice; no pre-registration is necessary.

MOBILE PHONES

As a courtesy to other conference attendees and speakers, we request that you turn off (or switch to silent mode) all personal communication devices during the conference sessions. Mobile phone calls should be taken outside of the conference session rooms and dining rooms.

CANCELLATION POLICY

A full refund on the conference portion of the fee, excluding golf and other activity fees, is available for cancellations that are received *in writing* no later than **Friday, July 19, 2024**. Cancellations received in writing between **July 20 and August 23, 2024** will result in a 50% refund of the conference registration fee, excluding golf fee. **No refund for any component of the conference is possible after Friday, August 23, 2024.** Substitution of a delegate is permitted; however, such arrangements must be initiated by the originally registered Delegate.

Please note that the Hotel has its own cancellation policy for guestrooms which is independent of ACPM's policy and is as follows: Cancellations received 48 hours prior to arrival will be refunded fully. Cancellations received less than 48 hours prior to arrival will incur a cancellation fee equivalent to a one-night stay. Please contact the Hotel directly to request your cancellation if you have made the original booking.

ACPM assumes no liability for changes in the program or its content, social activities, event dates, session times, or venues.