

ANNUAL
REPORT
2020
▼
2021



Improving the Canadian Retirement System.



ACPM (The Association of Canadian Pension Management) is the leading advocate for plan sponsors and administrators in the pursuit of a balanced, effective and sustainable retirement income system in Canada. We represent plan sponsors, administrators and trustees and our membership represents retirement income plans that cover millions of plan members.



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Vision, Mission and Guiding Principles

VISION

The leading advocate for plan sponsors and administrators in the pursuit of a balanced, effective and sustainable retirement income system in Canada.



MISSION

ACPM enlists the talent, dedication and resources of its national volunteer member base to provide thought leadership in retirement income system policy and advocacy on behalf of Canadian plan sponsors and administrators in collaboration with their service providers.

GUIDING POLICY PRINCIPLES

ACPM believes in the following principles as the basis for its policy development in support of an effective and sustainable Canadian retirement income system:

Diversification through Voluntary / Mandatory and Public / Private Options

Canada's retirement income system should be comprised of mandatory public programs ("First and Second Pillar") and an appropriate mix of voluntary workplace and individual savings arrangements ("Third Pillar").

Empowering Choice in Coverage

Third Pillar arrangements should be encouraged and play a meaningful ongoing role in Canada's retirement income system.

Harmonization

Canada's pension legislation should always strive for better harmonization across jurisdictions.

Adequacy, Security and Affordability

The components of Canada's retirement income system should ensure a healthy balance between these three objectives to enable Canadians to receive adequate and secure retirement incomes at a reasonable cost and in an efficient way for individuals and organizations.

Innovation in Plan Design

Canada's retirement income system should encourage and facilitate innovation in plan design in all three Pillars.

Adaptability

Canada's retirement income system should be able to adapt to changing circumstances without the need for comprehensive legislative changes.

Clarity and Transparency

Legislation, regulations and retirement income arrangements should be clearly defined and pension plan beneficiaries should be appropriately informed of risks, costs and benefits.

Good Governance

Excellence in plan governance and administration in the retirement income system.

Our Values

OUR VALUES

Member Focus

Understanding ACPM members' views, needs and interests.

Talent and Diversity

The central role played by our primary asset: skilled individuals volunteering their professional expertise, while striving for diversity reflective of our membership and Canadian society.

Balanced Consideration

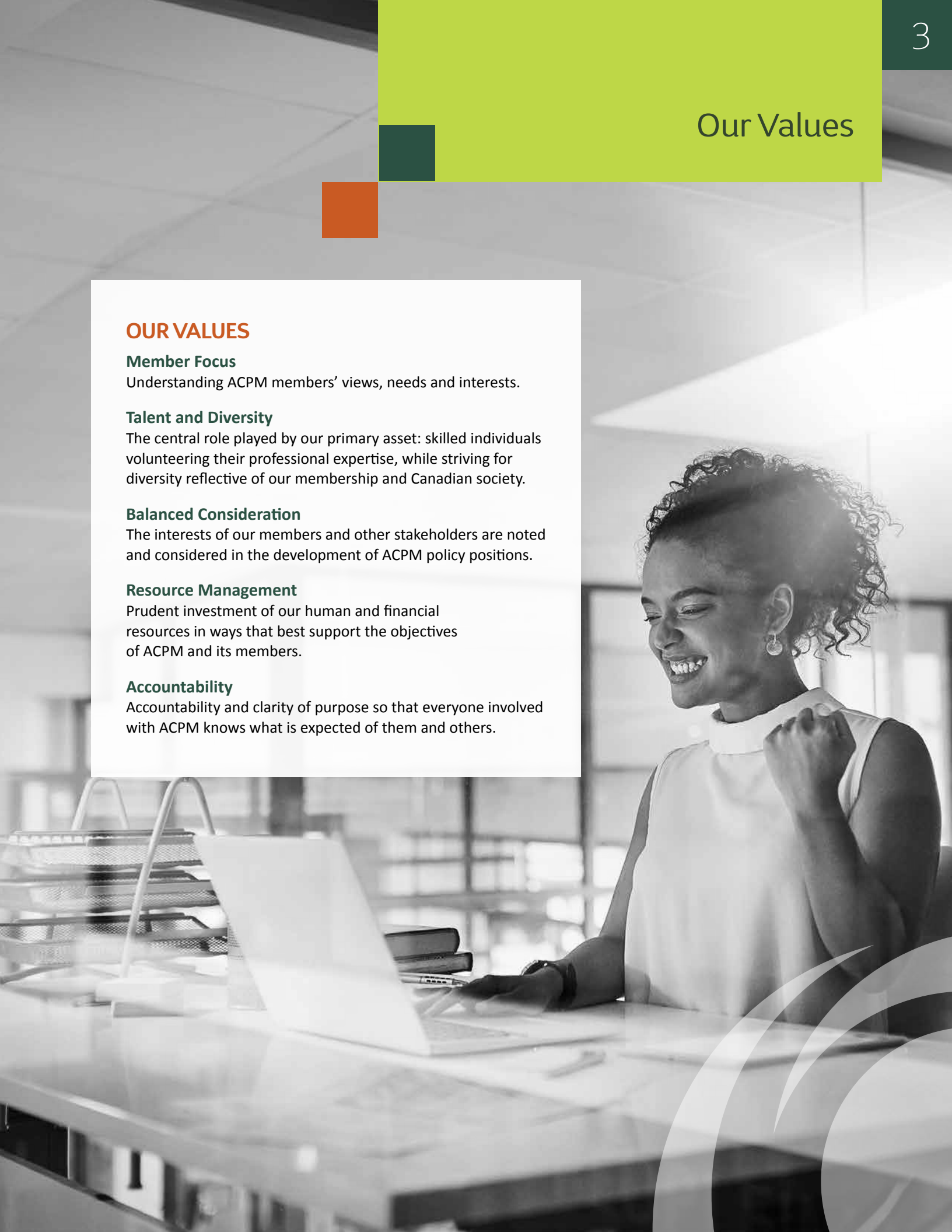
The interests of our members and other stakeholders are noted and considered in the development of ACPM policy positions.

Resource Management

Prudent investment of our human and financial resources in ways that best support the objectives of ACPM and its members.

Accountability

Accountability and clarity of purpose so that everyone involved with ACPM knows what is expected of them and others.



Message from the President

ROSS DUNLOP

President, ACPM Board of Directors



In 2020, I became the new President of the ACPM Board of Directors, probably during one of the most uncertain times in history as we were challenged with the numerous issues created by the COVID-19 global pandemic. Like many other organizations, we did not know how the situation would impact our advocacy work, our financial situation and our valuable volunteer network.

What we discovered is that our membership support continued to strengthen throughout the year. Federal and provincial governments and their regulatory agencies welcomed guidance from ACPM as we advocated for relief for retirement plan sponsors and administrators who were under severe pressure. We expected an unparalleled year-end deficit but actually emerged from the 2020–21 fiscal year with a small surplus and in great shape for 2021.

How did this turn of events occur? First off, let's put credit where credit is due — I want to acknowledge the ACPM membership, our dedicated volunteer network and the stakeholders that made such an outcome possible. I would also like to thank Susan Nickerson (Torys LLP), Board President for much of 2020, who provided national leadership at a time when we needed it most. She has been an integral part of the organization for many years and we are fortunate in having her on the Board in 2021.

When 2020 began to unfold, some people thought that the year would be less demanding but we discovered exactly the opposite. The equity market had taken a sharp correction at the start of the pandemic and liquidity was severely challenging. Plan sponsors and administrators had to deal with unattainable filing deadlines, threats to funding levels and global economic uncertainty — not to mention managing the societal effects of the COVID-19 pandemic; their long hours were matched by their service providers who were also grappling with a variety of challenges. Led by our national committees and

regional councils, we placed relief and accommodation for plan sponsors and administrators at the top of the list. I would like to extend a big “Thank you” to the numerous governments and agencies that rose to the occasion by relieving some of the pressures on the retirement industry. Here are some of the issues we addressed during this time:

- » COVID-19 relief measures
- » COVID Leave and Pension Plans
- » Funding Framework for DB Plans
- » Asset transfers
- » Missing Members
- » Unlocking questionnaire
- » Supplementary Pension Measures
- » Target Benefit Plans
- » Strengthening Canadians Retirement Security

By the time I took the helm of ACPM in Fall 2020 as the new President of the Board, ACPM was already in much better shape than we had anticipated. We took the opportunity to make positive changes to our by-laws and expanded the Board to accommodate representatives on behalf of the Federal Council. Duncan Burrill (CBC Pension Plan) was added to the Board as a Federal Council representative and, during this time, Andrea Perry (Northern Trust) stepped off the Board and was replaced by Chuck Bruce (Provident¹⁰) as an Atlantic representative.

Having said that, I would like to extend our gratitude to Andrea Perry, Chair, National Conference Planning Committee (NCPC), who stepped off the Board but then went on to mobilize her committee who produced a range of material that we converted to virtual format events for our members and stakeholders. Her dedication has been exceptional and she exemplifies the calibre of both our volunteers and membership.

In respect to membership, I would like to acknowledge the ACPM Leadership Program Committee who, despite the economic environment, expanded program participation to include Manulife Investment

Management, BMO Global Asset Management and Western Union. The Leadership Program is now at its highest level of participants since the program started over ten years ago.

As we proceed into 2021, it is clear that the pandemic has impacted retirement outcomes for Canadians as saving for retirement was not a priority for many people in 2020 as many struggled to survive loss of employment.

What I can say with certainty is that within our membership, the knowledge and experience exists to find solutions to advance retirement income scenarios for Canadians. Throughout the course of the 2020–21 fiscal year, I have learned that the resilience of our organization is greater than I could have expected and this solid foundation will enable us to help in ensuring a balanced, effective and sustainable retirement income system in Canada — something good for all of us.

Thank you for your support and all the best.

Sincerely,



Ross Dunlop
President, Board of Directors
ACPM



National Board of Directors 2020|21



ROSS DUNLOP

President of the Board
Winnipeg, MB

Executive Vice-President
Ellement Consulting Group



TODD SAULNIER

Vice-President of the Board
Ottawa, ON

Principal
Mercer



CAROLE FIELD

Secretary of the Board
Calgary, AB

Managing Director of Pension Plan Management
Canadian Pacific



CHRIS BROWN, Director
Edmonton, AB
President & CEO
LAPP Corporation



CHUCK BRUCE, Director
St. John's, NL
CEO
Provident¹⁰



KENNETH BURNS, Director
Vancouver, BC
Partner
Lawson Lundell LLP



DUNCAN BURRILL, Director
Ottawa, ON
Managing Director/CEO
CBC Pension Board of Trustees



DEREK DOBSON, Director
Toronto, ON
CEO and Plan Manager
CAAT Pension Plan



ROSALIND GILBERT, Director
Vancouver, BC
Aon (Ret.)



JOHN HALLETT, Director
Regina, SK
Retirement Strategist,
Group Retirement Services
Sun Life Financial



MICHEL JALBERT, Director
Montréal, QC
Addenda Capital (Ret.)



ELEANOR MARSHALL, Director
Saint John, NB
Vice-President, Pension & Benefits
and Assistant Treasurer
Bell Canada



SUSAN NICKERSON, Director
Toronto, ON
Partner
Torys LLP



JULIEN RANGER, Director
Montréal, QC
Partner, Pensions & Benefits
Osler, Hoskin & Harcourt LLP



PETER SHENA, Director
Toronto, ON
EVP & Chief Pension Officer
Ontario Pension Board

Board Committees



AUDIT & FINANCE COMMITTEE

The Audit & Finance Committee oversees the stability of the organization's financial standing, the effectiveness of internal controls and serves as a liaison between the Board of Directors and external auditors.

The Committee reviews financial policies and investment strategies and makes recommendations to the Board for changes as required.

CHAIR

ELEANOR MARSHALL

Bell Canada

MEMBERS

KENNETH BURNS

Lawson Lundell LLP

DUNCAN BURRILL

CBC Pension Board of Trustees

ROSS DUNLOP

Ellement Consulting Group
President of the Board (Ex Officio)

MICHEL JALBERT

Addenda Capital (Ret.)

EXECUTIVE COMMITTEE

The Executive Committee co-ordinates ACPM's advocacy and government relations strategy in respect to policy positions and priorities. In conjunction with other national committees and councils, the Executive Committee develops strategic initiatives in support of the advocacy goals of the organization.

CHAIR

ROSS DUNLOP

Ellement Consulting Group

MEMBERS

RACHEL ARBOUR

HOOPP

CHRIS BROWN

LAPP Corporation

STEPHANIE KALINOWSKI

Hicks Morley Hamilton
Stewart Storie LLP

RIC MARRERO, CEO

ACPM

TODD SAULNIER

Mercer

GOVERNANCE & NOMINATING COMMITTEE

The Governance & Nominating Committee makes recommendations to the Board on all governance matters including the delegation of authority, assessment of Board effectiveness and Board governance policies.

The Committee also identifies and recommends candidates for election to the Board as well as candidates to lead ACPM national committees and councils.

CHAIR

SUSAN NICKERSON

Torys LLP

MEMBERS

CHRIS BROWN

LAPP Corporation

ROSS DUNLOP

Ellement Consulting Group
President of the Board (Ex Officio)

ROSALIND GILBERT

Aon (Ret.)

TODD SAULNIER

Mercer

PETER SHENA

Ontario Pension Board

HUMAN RESOURCES COMMITTEE

The Human Resources Committee makes recommendations to the Board regarding the establishment and review of annual performance objectives for the Chief Executive Officer.

In consultation with the Chief Executive Officer, the Committee is responsible for recommendations to the ACPM compensation and benefit policy.

CHAIR

CAROLE FIELD

Canadian Pacific

MEMBERS

CHUCK BRUCE

Provident¹⁰

DEREK DOBSON

CAAT Pension Plan

ROSS DUNLOP

Ellement Consulting Group
President of the Board (Ex Officio)

JOHN HALLETT

Sun Life Financial

JULIEN RANGER

Osler, Hoskin & Harcourt LLP

Advocacy

Since its inception in 1976, ACPM has become Canada's leading advocacy organization for retirement plan sponsors and administrators. With the support of volunteer professionals with a range of expertise, ACPM identifies and assesses legislation and regulations related to retirement income issues at the federal and provincial levels.

In conjunction with the ACPM National Policy Committee, submissions are prepared and presented to governments, agencies, commissions and other special advisory groups. In addition, ACPM crafts white papers on specific subjects of interest which are released to the retirement income industry, governments and the general public.

The keys to our success are strong and mutually productive relationships with governments and their respective agencies. Through these cooperative relationships, we can effectively bring about positive change on behalf of our members and the retirement income industry in the pursuit of an equitable and sustainable retirement income system.

SUBMISSIONS

Advocacy Submissions: January 2020–January 2021

JANUARY 2020

ONTARIO » Ministry of Finance *re: PBA changes*

FEBRUARY 2020

NEW BRUNSWICK » Funding Framework for Defined Benefit Plans

QUÉBEC » Comments on the Retraite Québec Strategic Plan 2020–23

MARCH 2020

QUÉBEC » Government and Retraite Québec *re: COVID-19*

FEDERAL » OSFI Instruction Guide – *Actuarial Reports for DB Pension Plans*

ONTARIO » Ministry of Finance *re: COVID-19 situation*

FEDERAL » Pre-retirement death waiver and Electronic communications

MAY 2020

ALBERTA » Finance *re: COVID-19 relief measures*

ONTARIO » Submission to FSRA *re: COVID-19*

SASKATCHEWAN » Letter to Finance *re: COVID-19*

JUNE 2020

MANITOBA » Manitoba Minister of Finance *re: COVID-19 situation*

ONTARIO » Submission to Ontario Ministry of Labour *re: COVID-Leave*

JULY 2020

NEW BRUNSWICK » Government of New Brunswick *re: Regulatory amendments*

ONTARIO » Ministry of Finance *re: Auto-features*

FEDERAL » Letter to CRA *re: Actuarial Bulletin No 4*

AUGUST 2020

QUÉBEC » Letter to Retraite Québec *re: Projet de loi*

OCTOBER 2020

ONTARIO » Submission to FSRA: *Missing Members*

ONTARIO » Submission to FSRA: *Missing Members re: Service standards*

NEWFOUNDLAND & LABRADOR » *Re: Unlocking*

NOVEMBER 2020

ONTARIO » Submission to FSRA: *Asset transfer*

JANUARY 2021

FEDERAL » Letter to MoF *re: Overpayment Recovery*

FEDERAL » Response: *Strengthening Canadians Retirement Security*

CAPSA » Response: *CAPSA Guideline No 7*

Report of the Audit and Finance Committee

FOR THE YEAR ENDING JANUARY 31, 2021

Financial highlights include the following:

1. Net Assets at January 31, 2021, were \$1,132,465 compared to \$1,108,975 at the same time the previous year.
2. The Association recorded an operating surplus of \$24,364.
3. Revenues came in at \$695,445 compared to \$1,485,201 the previous year. This decrease was due to the impact of COVID-19 and the inability to hold in-person events.
4. Expenses totalled \$671,081 as compared to \$1,259,209 the previous year.
5. At year-end, ACPM had \$962,426 (including interest) in investments. This meets with ACPM Reserve policy, which ensures that sufficient funds are set aside to allow for fluctuations in revenues, expenditures and unforeseen contingencies.

Providing adequate resources to support the ongoing cost of ACPM operations is critical for ACPM to serve its members and advocate for an effective and sustainable Canadian retirement income system.

NOTE: ACPM's audited 2020-21 financial statements are available in the "Members Only" section of the ACPM website (www.acpm.com).

COMMITTEE MEMBERS

ELEANOR MARSHALL, Chair
Bell Canada

KENNETH BURNS
Lawson Lundell LLP

DUNCAN BURRILL
CBC Pension Board of Trustees

ROSS DUNLOP
Ellement Consulting Group
President of the Board (Ex Officio)

MICHEL JALBERT
Addenda Capital (Ret.)



National Committees

NATIONAL POLICY COMMITTEE (NPC)

The National Policy Committee (NPC) has a broad, national membership consisting of experts from different industry sectors. The Committee is responsible for identifying issues which can affect the health and growth of Canada's retirement income system and to develop policy positions that are consistent with ACPM's Vision, Mission, Goals and Guiding Principles.

CHAIR STEPHANIE KALINOWSKI —

Hicks Morley Hamilton Stewart Storie LLP

VICE-CHAIR RACHEL ARBOUR — HOOPP

NATIONAL CONFERENCE PLANNING COMMITTEE (NCPC)

The National Conference Planning Committee consists of volunteer members from various professional disciplines across Canada. The Committee identifies major retirement income issues, develops the conference agenda and secures the necessary individuals and expertise that will result in a rewarding, unique and informative experience for all conference delegates.

CHAIR ANDREA PERRY —

Northern Trust Company, Canada

VICE-CHAIR KATHRYN BUSH —

Blake, Cassels & Graydon LLP

EDITORIAL COMMITTEE (EDCOM)

The Editorial Committee provides guidance in the development and publication of *The Observer*, in approval of ACPM-hosted webinar content and in other ACPM communications vehicles as required. The Committee is guided by the goals of ACPM, prioritizing issues relevant to the Canadian retirement income industry and encouraging membership and participation by making a platform available for thought leadership on relevant topics.

CHAIR PAULA POTTER — Saskatchewan Healthcare Employees' Pension Plan

VICE-CHAIR JAMES FU — Borden Ladner Gervais LLP

LEADERSHIP PROGRAM COMMITTEE (LPC)

The Leadership Program Committee (formerly known as the Executive Membership Engagement Committee) consists of representatives from various sectors of the retirement income industry. Working with the ACPM Board of Directors, National Committees and Councils, their mandate is to broaden ongoing support for ACPM advocacy efforts. They maintain the integrity of the ACPM Leadership Program by demonstrating program value and fostering the growth and retention of ACPM Leadership Supporters.

CHAIR CAROLE FIELD — Canadian Pacific

VICE-CHAIR JOE CONNOLLY — Morneau Shepell

STRATEGIC INITIATIVES COMMITTEE (SIC)

The Strategic Initiatives Committee consists of members from across the country with an in-depth knowledge of retirement income issues. They lead major projects as required and provide support in the overall achievement of ACPM's short and long-term goals and objectives. To fulfill its purpose, the Committee works in conjunction with the National Office to complete various organizational projects and initiatives.

CHAIR PIERRE LAVIGNE

VICE-CHAIR VINCENT HOULE — Linea Solutions, Inc.

NOTE: In accordance with the By-laws, the President of the Board and the ACPM CEO are ex officio members of all National Committees and Councils.

Federal Council

CHAIR

ANDREA BOCTOR
Osler, Hoskin & Harcourt LLP

VICE-CHAIR

ALEXANDRA LESLIE
NAV Canada

PARTICIPATING ORGANIZATIONS

AIR CANADA
BANK OF CANADA
BELL CANADA
CANADA POST
CANADIAN PACIFIC
CBC PENSION FUND
CIBC
CN
ENBRIDGE
ERNST & YOUNG LLP
EXPORT DEVELOPMENT CANADA
MERCER
MORNEAU SHEPELL
NATIONAL BANK OF CANADA
NAV CANADA
NORMANDIN BEAUDRY
RBA GROUPE FINANCIER
SCOTIABANK
TELUS
TORYS LLP

The **FEDERAL COUNCIL (FC)** consists of federally regulated pension plans and their role is to identify relevant issues and to cultivate an ongoing relationship with the Office of the Superintendent of Financial Institutions (OSFI). Federally regulated plans include the areas of telecommunications, interprovincial ground transportation, airlines, banks, insurance companies, Crown corporations and entities and indigenous pension plans.

National Council

The **NATIONAL COUNCIL** acts as a “Council of Councils” and by doing so provides a forum for ACPM Councils to share ideas and discuss issues and matters of common concern.

The National Council facilitates communications between the Councils and National Committees, thus assisting in the coordination of ACPM’s advocacy efforts.

MEMBERS

ROSS DUNLOP

President of the Board
Ellement Consulting Group

STEPHANIE KALINOWSKI

Chair, National Policy Committee
Hicks Morley Hamilton Stewart Storie LLP



COUNCILS' MEMBERS

British Columbia Regional Council (BCRC)

BARB BILSLAND, Chair
Bilsland Griffith Benefit Administrators

AMY PUN, Vice-Chair
Morneau Shepell

Alberta Regional Council (ABRC)

MICHAEL WOLPERT, Chair
Fasken Martineau Dumoulin LLP

JULIE JOYAL, Vice-Chair
Alberta Teachers' Retirement Fund

Prairie Regional Council (PRC)

BRAD PROKOP, Chair
Teachers' Retirement Allowances Fund

PAULA POTTER, Vice-Chair
Saskatchewan Healthcare Employees' Pension Plan (SHEPP)

Ontario Regional Council (ONRC)

DANELLE PARKINSON, Chair
Ontario Pension Board

KAREN BURNETT, Vice-Chair
Willis Towers Watson

Québec Regional Council (QRC)

TINA HOBBDAY, Chair
Langlois Lawyers, LLP

F. HUBERT TREMBLAY, Vice-Chair
Mercer

Atlantic Regional Council (ARC)

JIM POWER, Chair
Sun Life Financial

MARK WHIDDEN, Vice-Chair
HRM Pension Plan

Federal Council (FC)

ANDREA BOCTOR, Chair
Osler, Hoskin & Harcourt LLP

ALEXANDRA LESLIE, Vice-Chair
NAV Canada

ACPM Councils across the country consist of retirement income industry professionals who discuss federal and provincial retirement legislation and regulations, assist in developing advocacy positions, plan regional information sessions and network with existing and potential ACPM members.

2020|21 REGIONAL COUNCIL ACTIVITIES

British Columbia Regional Council

The Evolving Pension Landscape in BC

Featured:

Cynthia Callahan-Maureen

Director of Pensions and Personal Property Security, *Ministry of Finance*

Jaime Omichinski – Head of Retirement Business, Vancouver, *Willis Towers Watson*

Michael Peters – Deputy Superintendent of Pensions and Vice President, *BC Financial Services Authority*

Alberta Regional Council

The Value of a Pension

Featured:

Dr. Jack Mintz – President's Fellow of the School of Public Policy, *University of Calgary*

Prairie Regional Council

Investment Leaders' Virtual Roundtable: Pension Investment Issues and Challenges

Featured:

Brent Godson – Investment Manager, *CSS Pension Plan*

Graeme Hay, CPA, CMA, CFA – Chief Investment Officer, *Teachers' Retirement Allowances Fund (TRAF)*

Peter Josephson, CFA – Chief Investment Officer, *Civil Service Superannuation Board (CSSB)*



Ontario Regional Council

Moving Pension Plan Communications onto the Digital Highway

Featured:

Alida Ladak – Director, Experience Design & Innovation, Ontario Teachers' Pension Plan

Jonathan Marin – Partner, Osler, Hoskin & Harcourt LLP

Karen Kahansky – Senior Consulting Lawyer, Willis Towers Watson

Ayush Massey – AVP Client Engagement Strategy, Sun Life Financial

SAVE THE DATE!

2022 Ontario Regional Council Golf Tournament

→ Go to acpm.com for more information.

HOLE-IN-ONE



EAGLE

Manulife
Investment Management



BIRDIE



Québec Regional Council

A pension plan understood and appreciated by employees: mission possible? (in French)

Featured:

Pierre Girard – Directeur du Bureau de la retraite, Régime de retraite du personnel des CPE et des garderies privées conventionnées du Québec

Hélène Thibault – Responsable de portefeuille, perspectives de marché et rémunération, WSP Canada

Daniel Dumas – Directeur, Solutions de communication et de gestion du changement, Morneau Shepell

Anne Boucher – Associée, Communication, Normandin Beaudry

Target Benefit Pension Plan: Is it for you? (in French)

Featured:

Francis Vailles – Chroniqueur, La Presse

Luc Bourassa – Directeur des Ressources humaines, ABS et Communications, Alcoa

Luc Girard – Membre du partenariat, Mercer

Daniel Simard – Directeur général, Bâtirente

Atlantic Regional Council

Best Practices for Plan Member Communications

Featured:

Blair Richards – CIO, Halifax Port ILA/HEA Pension Plan

Hugh Wright – Partner, McInnes Cooper

Additional Activities

ROUNDTABLE BROADCAST SERIES

Fiduciary Duties in the Time of COVID-19

Featured: **Ken Burns** – Partner, *Lawson Lundell LLP*, Vancouver
Kathryn Bush – Partner, *Blake, Cassels & Graydon LLP*, Toronto
Julien Ranger – Partner, Pensions & Benefits, *Osler, Hoskin & Harcourt LLP*, Montreal

The Future of Investment is a Brave New World

Featured: **Derek Brodersen** – CIO, *Alberta Teachers' Retirement Fund*
Yanick Desnoyers – Vice-President and Senior Economist, *Addenda Capital*
Marlene Puffer – President and Chief Executive Officer, CN Investment Division, *Canadian National Railway Company*
Todd Saulnier – Senior Consultant, *Mercer*

What Keeps Up at Night? Pension Leaders' View from the Top

Featured: **Chuck Bruce** – CEO, *Provident¹⁰*
Chris Brown – President and CEO, *LAPP Corporation*
Barbara Zvan – President and CEO, *University Pension Plan*

DC Plans in the Time of COVID-19

Featured: **Janice Holman** – Principal, *Eckler*
Eleanor Marshall – Vice-President Pension & Benefits, Assistant Treasurer, *Bell Canada*
Martin McInnis – Executive Director, *CSS Pension Plan*
Kate Nazar – VP, Strategy and Market Development, Group Retirement Services, *Sun Life Financial*

Regulating Through a Pandemic and Beyond

Featured: **Caroline Blouin** – Executive Vice President, Pensions, *Financial Services Regulatory Authority of Ontario (FSRA)*
Jeff Boxer – Manager, Actuarial and Policy Division, *Canada Revenue Agency (CRA)*
Michael Peters – Vice-President and Deputy Superintendent of Pensions, *BC Financial Services Agency (BCFSA)*

Private Investments: Current Environment and Emerging Trends

Featured: **Jamie Becker** – Counsel, *Torys LLP*
Johnathan Seeg – Managing Director, *BlackRock Private Equity Partners*

Responsible Investing – Practical advice for plan sponsors and administrators

Featured: **Deborah Debas** – Responsible Investment Specialist, *Desjardins Investment Solutions, Desjardins Wealth Management*
Alison Schneider – Vice-President Responsible Investment, *Alberta Investment Management Corp. (AIMCo)*
Sarah Takaki – Senior Director, Sustainable Investing, *Healthcare of Ontario Pension Plan (HOOPP)*

WEBINAR PROGRAM

In 2020, the ACPM webinar program expanded thanks to its popularity among presenters and participants alike. Here is the list of presentations that were available this past year:

TCFD Implementation Practical Insights and Perspectives from Institutional Investors

Presented by: **Maria Montero** – Climate Change Program Head, *Canada Pension Plan Investment Board*
Daren Smith – President and CIO, *University of Toronto Asset Management Corporation*

Economic Outlook and Investment Implications for Pension Plans COVID-19 and Beyond

Presented by: **Carlo Dilalla, CFA** – Vice-President and Head, Client Portfolio Management & Solutions, *CIBC Asset Management*
Michael Sager, Ph.D. – Vice-President, Client Portfolio Manager – Multi-asset & Currency Management, *CIBC Asset Management*

To what extent do equity market valuations reflect the global economic reality?

Presented by: **Luke Casey** – Product Specialist, *Pyrford International*
Tony Cousins – CEO and CIO, *Pyrford International*

Perspectives on the economy in the wake of COVID-19

Presented by: **Carl Tannenbaum**, Executive Vice-President and Chief Economists, *Northern Trust*

The US Election – How will Canada's economy respond?

Presented by: **Eric Lascelles** – Chief Economist, *RBC Global Asset Management*

RETIREMENT LITERACY WEBSITE

<https://retirementliteracy.acpm.com/>

The Retirement Literacy website was created by ACPM to provide Canadians with important information to help them plan their retirement income options. Content includes educational quizzes about government programs, workplace retirement savings plans, individual savings plans and CPP Investments. Visitors can access links to additional information about saving for retirement – the ACPM Retirement Literacy website is made possible through the generosity of these project sponsors:



THE OBSERVER

The ACPM Observer provides numerous articles from experienced industry professionals on various issues and developments that affect the Canadian retirement income industry. There are also links to legal and regulatory updates from governments and agencies that have occurred in the recent past.

Thank you to the advertisers that have supported “The Observer” in 2020 | 21:

Blakes

Lawyers



CAREERPOST

This program provides an opportunity for Employers and Recruiters to access an exclusive group of senior pension and retirement income industry professionals.

eBLAST PROGRAM

This promotional opportunity allows organizations to deliver a customized message to retirement income professionals across the country. The contact list has thousands of records and includes a wide variety of plan sponsors, administrators and associated service providers.



Membership

ACPM is:

- » The leading national and provincial representative for the retirement income industry
- » A source of timely and relevant information
- » Provides networking opportunities with senior decision makers and organizational leaders
- » Develops relationships with federal and provincial governments and regulatory agencies
- » The only national association whose mandate is the pursuit of a sustainable and equitable retirement income system in Canada

ACPM members represents:

Plan sponsors, Administrators and Trustees; Actuarial, Consulting and Accounting firms; Investment and Legal Firms; Custodians and Record Keepers; Labour Organizations; HR Professionals; Government Ministries and their Regulatory Bodies; Professional and Industry Associations.

Responses to federal, provincial, and territorial governments cover many topics, including:

- » Defined Benefit Plan Funding
- » Capital Accumulation Plans and Decumulation Issues
- » Target Benefit Plans
- » Solvency Funding
- » Member Communications
- » Mandatory Public Pension Plans
- » Environmental, Social and Governance policies
- » Financial Literacy
- » Plan Conversions
- » Many other important federal and provincial topics



MEMBERSHIP BENEFITS

ACPM PROGRAMS AND EVENTS, INCLUDING:

- » **DISCOUNTS** for the virtual 2021 *ACPM National Conference*, September 14-16, 2021
- » **DISCOUNTS** for *ACPM Council Events*
- » **FREE** registration for *Webinars* and *Roundtable Broadcast*
- » Ability to **SHARE YOUR MESSAGE** and knowledge with industry professionals through our *Webinar* and *eBlast Programs*

TIMELY INDUSTRY COMMUNICATIONS:

- » **“CONTACT”** eNewsletter to keep you informed on the latest developments
- » **“The Observer”** that’s full of industry news and views
- » **“CareerPost”** — Online career opportunities for employers and career seekers
- » Special **ACCESS** to member lists, information archives and event presentations
- » Take a **QUIZ** on the ACPM Retirement Literacy website

PROFESSIONAL DEVELOPMENT AND VOLUNTEER OPPORTUNITIES:

- » **Eligibility** to join Councils and National Committees
- » **Voting and nomination rights** at the Annual General Meeting
- » Attending ACPM conferences, seminars and webinars can be counted towards **Continuing Professional Development hours!**

MEMBERSHIP TYPES

	TYPE	DESCRIPTION
GENERAL INDIVIDUAL MEMBERSHIP	INDIVIDUAL	Individual engaged and/or interested in the retirement income industry.
	NON-ACTIVE	Persons who no longer are fully employed in the retirement income and/or employee benefits industry, who wish to retain their affiliation with the Association.
	STUDENT	Persons who are not currently working in the retirement income and/or employee benefits industry and are engaged at an accredited educational institution in full or part-time studies or who have graduated and wish to be affiliated with the Association while they are seeking employment in the industry.
PLAN SPONSOR MEMBERSHIP	PLAN SPONSOR INDIVIDUAL	4 members or less
	PLAN SPONSOR GROUP MEMBERSHIP	5 to 9 members
	PLAN SPONSOR GROUP MEMBERSHIP	10 or more members
LEADERSHIP PROGRAM	PLATINUM	Contact National Office for more details.
	GOLD	

Please visit acpm.com for membership details and rates.

Volunteer Recognition Awards

Without the dedication and commitment of our volunteers, ACPM would not have become the leading advocacy organization for the retirement income industry in Canada.

Since 2009, these outstanding individual volunteers, who have contributed significantly and consistently to ACPM, have been acknowledged with one of these three awards:

- » **THE DON IRELAND FOR EXCEPTIONAL VOLUNTEERISM AWARD**
Recognizes the exceptional effort and achievements of an individual over a significant period of time on behalf of ACPM.
- » **THE ACPM INDUSTRY AWARD**
Recognizes the efforts and achievements of an individual who has proven to be an inspiration for fundamental change in the Canadian retirement income industry.
- » **THE ACPM COUNCIL AWARD**
Recognizes the efforts of an individual who has significantly contributed to the work, growth and development of their Council.

We would also like to acknowledge the dozens of volunteers who may not have been award winners but have provided their time and expertise in support of the ACPM Mission.

ACPM Members provide the experience and guidance that supports our work in the pursuit of an effective and sustainable Canadian retirement income system. We are committed to an innovative and responsive Canadian retirement income system that continues to be one of the best in the world.

ACPM DON IRELAND AWARD FOR EXCEPTIONAL VOLUNTEERISM WINNERS

2020



TODD SAULNIER

2019



Pierre Lavigne

2018



Kathryn Bush

2017



Chris Brown

2016



Susan Nickerson

2015



Scott Perkin

2014



Étienne Brodeur

2014



Bill Turnbull

2013



Paul Litner

2012



Claude Reny

2011



Rosalind Gilbert

2010



Becky J. West

2009



Andrew Harrison



ACPM INDUSTRY AWARD WINNERS



2019
DEREK DOBSON



2018
ELEANOR MARSHALL



2017
MICHEL ST-GERMAIN



2014
EMILIAN GROCH

ACPM COUNCIL AWARD WINNERS



DEBBIE GALLAGHER



MICHAEL WOLPERT

2020



STEPHANIE
KALINOWSKI



JULIEN
RANGER

2019



2018
DUNCAN
BURRILL



2017
SERGE
CHARBONNEAU



2015
ROSS
DUNLOP

Leadership Supporters

ACPM would like to extend its gratitude to Leadership Supporters for their generous support in the 2020/21 fiscal year.

PLATINUM LEVEL

GOLD LEVEL



NOTE: We respect the privacy of Leadership Supporters who have requested that their organizations remain anonymous.

National Office

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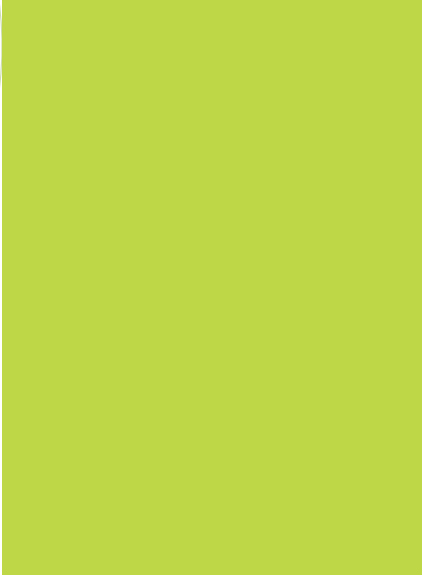
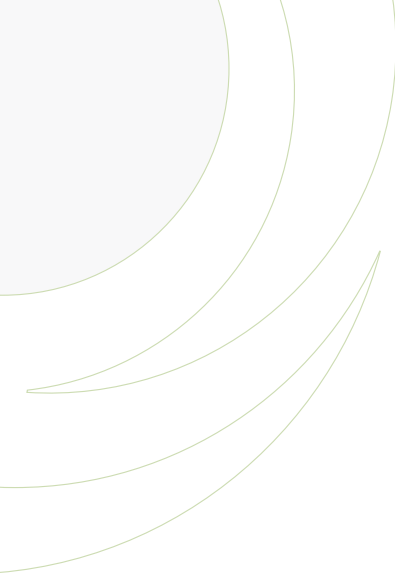
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The Association of Canadian Pension Management
L'Association canadienne des administrateurs de régimes de retraite



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