



# 2019 Pensions Conference

- ✓ Toronto, ON
- ✓ November 28–29, 2019
- ✓ Sheraton Centre Toronto Hotel



## Conference Day One

Thursday, November 28 • 9:00 a.m. – 4:00 p.m.

Panels will address the following topics:

- **Scanning the Horizon:**  
*The investment landscape for 2020 and beyond*
- **Major Caselaw and Legislative Update:**  
*The most important developments of the past year*
- **Beyond the Bottom Line:**  
*Socially responsible investing in infrastructure and real estate*
- **Gold-Standard Governance:**  
*Making the grade in an era of changing expectations*

## Conference Day Two

Friday, November 29 • 9:00 a.m. – 12:00 p.m.

Panels will address the following topics:

- **Bridging the DB/DC Divide:**  
*Searching for common ground*
- **Reflections on the Past, Lessons for the Future:**  
*Concluding insights and open-forum discussion*

Presented in association with:



Centre for Industrial Relations and Human Resources  
UNIVERSITY OF TORONTO

## Conference Co-Chairs



**Laura Brownell**

Senior Research Officer, Pensions  
Canadian Union of Public Employees



**Paul Litner**

Pensions Counsel  
Osler, Hoskin & Harcourt LLP

## Conference Advisory Committee

**Mike Dempsey**, Vice-President, Alberta Union of Provincial Employees, North-East Region and Sponsor Board Member, Public Sector Pension Plan and Local Authorities Pension Plan

**Derek Gerard**, Principal, Eckler

**David Leacock**, National Representative, Pensions & Benefits, Unifor

**Susan Nickerson**, Pensions Counsel, Torys LLP

**Angie Sorrell**, Executive Director, Pensions, Public Sector Employers' Council Secretariat, Ministry of Finance, Government of British Columbia and Trustee, BC Municipal Pension Board

**Kevin Thomas**, Chief Executive Officer, Shareholder Association for Research & Education

**Lesha Van Der Bij**, Chief Executive Officer, Optimize Legal

### Who Should Attend?

- HR management and union officers and representatives
- Union and management pension specialists and negotiators
- Labour, employment, and pensions lawyers
- Pension plan trustees, administrators, and actuaries
- Pension plan advisors and consultants
- Pension regulators and government officials



### Conference Venue

#### Sheraton Centre Toronto Hotel



123 Queen Street West,  
Toronto, ON  
M5H 2M9



(416) 361-1000

**Note:** Please contact Midu Rajapalan at [mrajapalan@lancasterhouse.com](mailto:mrajapalan@lancasterhouse.com) if you have any issues with hotel room reservations.

# Conference Day One • Thursday, November 28

REGISTRATION AND BREAKFAST • 8:00 a.m. – 9:00 a.m.

INTRODUCTORY REMARKS BY CO-CHAIRS • 9:00 a.m. – 9:10 a.m.

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## PANEL 1 • 9:10 a.m. – 10:30 a.m.

### Scanning the Horizon: *The investment landscape for 2020 and beyond*

#### PANELIST

##### Frances Donald

Managing Director, Chief Economist,  
and Head of Macroeconomic Strategy  
Manulife Investment Management

##### Abdul Sheikh

Vice President, Head of Pension  
and Custody Services  
CIBC Mellon

*The past year has seen a return of global economic volatility as well as continuing trade tensions, most notably in U.S. relationships with China and the European Union (EU), leading some commentators to raise the possibility that a recession may be on the horizon. In this panel, experts will discuss the current state of the global economy and what it portends for pension funds and their investment strategies in 2020 and beyond.*

BREAK (with refreshments) • 10:30 a.m. – 10:45 a.m.

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## PANEL 2 • 10:45 a.m. – 12:00 p.m.

### Major Caselaw and Legislative Update: *The most important developments of the past year*

#### PANELISTS

##### Susan Nickerson

Pensions Counsel  
Torys LLP

##### Susan Philpott

Pensions Counsel  
Goldblatt Partners LLP

##### Lesha Van Der Bij

Chief Executive Officer  
Optimize Legal

*In this session, seasoned experts will discuss the latest developments in caselaw, legislation, and policy and explain the implications for workplace parties and other pension industry stakeholders. Topics to be addressed include the revised and updated Canadian Association of Pension Supervisory Authorities (CAPSA) guidelines; legislative changes affecting funding and solvency frameworks; corporate accountability and disclosure; the use of electronic communications/designations in the pension industry; and ongoing pension-related Charter challenges. Final selection of topics will take place a few weeks before the conference, ensuring coverage of the year's latest and most important developments.*

NETWORKING LUNCH • 12:00 p.m. – 1:00 p.m.

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**PANEL 3 • 1:00 p.m. – 2:30 p.m.**

**Beyond the Bottom Line:**  
*Socially responsible investing in infrastructure and real estate*

PANELISTS

**Martine August**

Assistant Professor,  
School of Planning  
University of Waterloo

**Randy Bauslaugh**

Pensions Counsel  
McCarthy Tétrault LLP

**Réjean Bellemare**

Conseiller à la  
coordination régionale  
Fonds immobilier de  
solidarité FTQ

**Kevin Thomas**

Chief Executive Officer  
Shareholder Association  
for Research &  
Education

*Alternative assets such as real estate and infrastructure have become attractive to investors for their capacity to yield better returns than more conventional investments. Yet in recent years pension plans have found themselves caught in the middle of controversies involving these investments, including the “Justice for Janitors” campaign that convinced the Ontario Teachers’ Pension Plan to use its position as controlling owner of the Cadillac Fairview property management corporation to reverse the layoffs of some 150 largely female racialized workers, the Canadian Pension Plan Investment Board’s quiet divestment from private prison contractors in the U.S., and tenant protests over harsh rent increases and poor building maintenance at Toronto apartment towers owned by one of Canada’s largest public sector pension plans. In this panel, experts discuss issues of human rights, labour and employment rights, public interest, and fiduciary duty that may arise in the context of such investments.*

BREAK (with refreshments) • 2:30 p.m. – 2:45 p.m.

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**PANEL 4 • 2:45 p.m. – 4:00 p.m.**

**Gold-Standard Governance:**  
*Making the grade in an era of changing expectations*

PANELISTS

**Kathryn Bush**

Pensions Counsel  
Blake, Cassels  
& Graydon LLP

**Rasho Donchev**

Co-Chair, Governance  
Committee,  
Colleges of Applied  
Arts and Technology  
Pension Plan

**Lynette Martin**

Chief Executive Officer  
Alberta Public  
Sector Pension Plan  
Corporation

**Michael Mazzuca**

Pensions Counsel  
Koskie Minsky LLP

*In a world of market volatility, increased government regulation, and heightened scrutiny of pension investments by stakeholders and the general public, the challenges of good governance are myriad and rapidly evolving. In this session, seasoned experts will provide a definitive guide to the latest trends and current issues in pension governance.*

END OF DAY ONE • 4:00 p.m.

NETWORKING RECEPTION • 4:00 p.m. – 5:00 p.m.

## Conference Day Two • Friday, November 29

REGISTRATION AND BREAKFAST • 8:00 a.m. – 9:00 a.m.

INTRODUCTORY REMARKS BY CO-CHAIRS • 9:00 a.m. – 9:05 a.m.

**PANEL 5 • 9:05 a.m. – 10:20 a.m.**

### **Bridging the DB/DC Divide:** *Searching for common ground*

#### PANELISTS

##### **Ari Kaplan**

Pensions Counsel and Mediator  
Kaplan Law

##### **Stephen Eadie**

Actuary  
Robertson Eadie & Associates

##### **Chris Roberts**

National Director of Social  
and Economic Policy  
Canadian Labour Congress

*In a recent paper prepared for the C.D. Howe Institute, pension experts Robert Brown and Stephen Eadie propose a new paradigm that moves beyond the dichotomy between the classic DB and DC models. In this session, experts will discuss whether Brown and Eadie's call to find "common ground" between DB and DC can serve as the foundation for a new era of pension policy and innovation in Canada.*

BREAK (with refreshments) • 10:20 a.m. – 10:40 a.m.

**PANEL 6 • 10:40 a.m. – 12:00 p.m.**

### **Reflections on the Past, Lessons for the Future:** *Concluding insights and open-forum discussion*

#### PANELISTS

##### **Laura Brownell**

Senior Research Officer, Pensions  
Canadian Union of Public Employees

##### **Paul Litner**

Pensions Counsel  
Osler, Hoskin & Harcourt LLP

*In this session, the conference co-chairs will offer brief closing reflections on the conference as well as on the past, present, and future of the pensions industry. Following these insights, the session will be conducted as an open forum, with facilitators inviting comments and questions from the floor regarding key issues and take-aways from the conference. Attendees will deepen their understanding of the current pension landscape and what lies ahead as they exchange ideas with experts and peers from across Canada.*

CONFERENCE ENDS • 12:00 p.m.

“

Very well organized  
with good speakers and  
great staff.

”

– **Ross Undershute**  
President & CEO  
FAS Group of Companies

“

A great mix of labour and  
employer speakers interpret the  
current pension landscape.

”

– **Carolyn Olson**  
Labour Relations Officer  
United Nurses of Alberta

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or by calling our customer service team at (416) 977-6618.

Register and pay by ... \*

CONFERENCE	Nov. 27
<b>2019 Pensions Conference</b> Thursday, November 28 (Full day) and Friday, November 29 (Half day)	\$1,675

\* Price does not include HST.

#### NOTE:

- Registration fee includes breakfast, lunch, refreshments, and all materials.
- Payment must be received in full at least one business day prior to the first day of the conference.
- Substitution of participants is permitted at any time prior to the event — please contact Customer Service.
- Prices subject to change without notice.

Wi-Fi access will be provided



Bring your laptops, tablets,  
and smartphones

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