



CPBI
SASKATCHEWAN
REGION

CANADIAN PENSION & BENEFITS INSTITUTE



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CPBI Saskatchewan News

Summer Newsletter - July/August 2017

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Message from the Past-Chairperson



It is with extreme gratitude that I prepare this message for the newsletter now as past chair of CPBI Saskatchewan Regional Council.

I extend sincere thanks to all of our CPBI members and guests who supported our education events throughout the year. Further, I thank all of our CPBI Council members who worked diligently to plan and execute our events. What a privilege it is to work with and serve such a dedicated group of pension and benefit professionals.

2016/2017 was a real success for the Saskatchewan Region. We provided 6 breakfast/luncheon seminars that were very well attended and well received.

Benefits Beyond the Basics in March was a great addition to our programming year. And of course we concluded our year with our annual conference "Path to Greatness". What a magnificent year of learning and fellowship we all enjoyed.

As our year came to an end, we said farewell to some of our long serving Council Members: Glenda

Schlosser, Don Rowell, Sheryl Armstrong, and Bob Wilhelms. On behalf of CPBI, thank-you for your service to this wonderful organization.

With each new year we have the opportunity to welcome new members to our Council. This year we welcome to CPBI Saskatchewan Regional Council: Colette Wagner, Mobius Benefit Administrators Inc., Chad Corbin, Saskatchewan Blue Cross, Raymond Parsley, City of Saskatoon Superannuation Plan, and Jeremy Sloan, BMA Benefits Division. I know that you will be a fantastic addition to this dynamic group of people.

In June, I had the privilege of "passing the baton" to our new Chair, Dara Sewell-Zumstien. Dara is already busy leading the charge as work begins for the 2017/2018 program year.

I wish you all a safe and sunny summer and I look forward to seeing you at a CPBI Saskatchewan event in the future.

Alana Shearer-Kleefeld

Past-Chairperson

CPBI Saskatchewan Regional Council

Highlights from the CPBI Saskatchewan Regional Conference "Path to Greatness"



On April 25 to 27, 2017, CPBI Saskatchewan Regional Council hosted its 7th annual conference at TCU Place in Saskatoon, Saskatchewan. Talented speakers engaged conference delegates as all in attendance journeyed together down the yellow brick road! The topics explored challenges and opportunities - for investment strategies, leadership, retirement, present and future benefit plan challenges, customer interaction, and communication.



A **warm welcome reception** kicked off the 2017 CPBI Saskatchewan Regional Conference "Path to Greatness".



"We need more of this in the workplace!" - Michael Kerr

Michael Kerr entertained conference delegates at the evening dinner event. He shared practical, relevant ideas about fostering innovative and inspiring work cultures, and he delivered his ideas in a fun, energetic, and memorable style!



The **Disability Management Panel** explored two case studies: one involving a mental health claim and one involving a complex claim which included the use of marijuana. In these highly interactive breakout sessions, attendees took full advantage of the experts before them by asking meaningful questions pertaining to the case studies.



Keynote speakers gave presentations that were sometimes moving and inspirational, and always educational. **Frank O'Dea** (left), Innovative Entrepreneur and Humanitarian, shared his own amazing story and experiences of hope, courage, change, and persistence. Humble yet powerful, Frank related how he went from panhandling for nickels and dimes not so many years ago, to the successes he has achieved today. A very motivational story.



Five breakout sessions for the different streams of Pensions and Benefits provided in depth information on a variety of relevant and timely topics.

Thank you!

Without the support from our sponsors, events like this would not be possible. We would once again like to thank the following organizations for their support:

2017 Conference Sponsors

Diamond:	Silver:	Bronze:
GMS	Lawson Lundell	CHUBB
Saskatchewan Blue Cross	Desjardins Insurance	iA Financial Group
Franklin Templeton Institutional	Aon	Triasima
	Morneau Shepell	Mercer
Gold:	RBC Investor & Treasury Services	Media:
Sun Life Financial		Benefits and Pensions Monitor
The Co-operators		
Homewood Health		
Fidelity Investments		

CPBI is a national organization with regional councils across Canada. We would like to extend our sincere appreciation to **Peter Casquinha**, CEO of CPBI, who attended our conference again this year. This is the fourth time Peter has attended since we began hosting our regional conferences seven years ago. We are always thrilled to have representation from our national body at our conferences.

We would also like to extend our appreciation to **Joe Hornyak**, Executive Editor of [Benefits and Pension Monitor \(BPM\)](#) magazine, who attended the conference for his 7th consecutive year, and who wrote and published highlights about our conference. The recognition and participation that our event receives each year is due in part to the fantastic coverage that Joe provides in this distinguished national publication.



A big 'Thank-You' as well is extended to Sheryl Armstrong (left) for accepting the role as Chair of the Conference Planning Committee, and for her dedication and commitment to planning this year's conference. As well, we extend a huge 'Thank-You' to all Council members who served on the Conference Planning Committee for their countless hours and efforts in the preparation of the conference.

Lastly, we would also like to thank all of you for supporting our event for the 7th year in a row. It is the generosity of our sponsors and the commitment of our members and conference attendees that made *Path to Greatness* a resounding success.

Photo Credits: Kelley Orban and Shannon Keller

Welcome!

CPBI Saskatchewan is pleased to introduce our new Regional Council Chair, Dara Sewell-Zumstien.



Dara Sewell-Zumstien is the new Chair of CPBI Saskatchewan Regional Council. Dara will hold the position of chair for two years.

Dara has served CPBI Saskatchewan Regional Council as Vice Chair for the past 2 years. During her time on Council, Dara has participated on several committees including Finance & Audit, Professional Development, and Conference Planning. Dara is the point person responsible for bringing education to Saskatchewan through Humber College.

Dara is a Retirement Information Consultant with the Public Employees Benefits Agency where she provides support to pension plan members through both group and one on one education sessions.

Dara is a dedicated wife, mother and grandmother and resides in Moose Jaw. She is also a fitness enthusiast.

Dara is friendly, out-going, and has a great way of just rolling with situations as they arise. Dara brings energy and enthusiasm to every task. We wish Dara much success through her time as Chair.

CPBI Saskatchewan Regional Council also has the privilege of introducing four new Council Members.

Colette Wagner

Colette Wagner joined CPBI in 2017 as a new member and as a council member. Colette has a degree in Business Administration and is a CFA charterholder (Chartered Financial Analyst). Colette has worked in the Investment industry since 1994 as an analyst and portfolio manager. She volunteers for various organizations and works at Möbius Benefit Administrators Inc. as a Senior Investment Analyst. Colette serves on the Professional Developments Programs Committee. We look forward to utilizing her expertise to provide speakers and topics in the investment field.

Chad Corbin

Chad Corbin has been a CPBI member since 2013 and joined our regional council this year, 2017. Chad works as an Employee Benefits Specialist for Saskatchewan Blue Cross. He holds the Certified Employee Benefit Specialist (CEBS) Designation and has a Degree in Business Administration. Chad's professional experience is in Group Health and Life, in both sales and underwriting. Chad volunteers in his community in clubs and sports. Chad serves on both the Sponsorship and Membership Committee and the Finance Committee for our regional council. His experience and knowledge are welcomed on our Council.

Raymond Parsley

Raymond Parsley joins us as an employee appointed Trustee on the City of Saskatoon Defined Benefit Pension Plan. Ray is an employee of the City of Saskatoon. Ray has been a member of CPBI since 2010. He holds two trustee certificates (FTMS and ATMS) and has education in technical and trade schools. Ray serves on the Conference Planning Committee. He joined our council team this year and we are excited to have a trustee who can provide a perspective from the trustee side of pensions and benefits.

Jeremy Sloan

Jeremy Sloan joins us this year as a council member and has been a member of CPBI since 2015. Jeremy has a Business Administration Degree and is working towards obtaining a Master in Business Administration (MBA). Jeremy works as a sales and service manager for BMA Benefits in their Saskatoon office. He volunteers at several

organizations in Saskatoon. Jeremy serves on the Conference Planning Committee and his enthusiasm is welcomed and appreciated.

Regional Volunteer of the Year: Glenda Schlosser



Glenda Schlosser is the CPBI Saskatchewan Region Volunteer of the Year.

Glenda became a CPBI member in 2006 and joined CPBI Saskatchewan Regional Council in 2009. Glenda immediately jumped in as a member of Executive Council as our Treasurer and has held that role throughout her tenure. Glenda was a driving force in our Council achieving financial stability.

In addition, Glenda has been an active member on several committees including, Finance and Audit, Professional Development, and Conference Planning.

Glenda is always willing to lend a helping hand no matter what the task is that needs to be completed. Through her many industry contacts, she has been instrumental in assisting Council with many of the speakers we have enjoyed over the past years. She is a silent leader that never gets too emotional about things and is likely to bring levity to a difficult situation.

Glenda is Manager of Pension & Disability Administration at Möbius Benefit Administrators Inc.

PHOTO: Alana Shearer-Kleefeld, Chair, CPBI Saskatchewan Regional Council (right) presents the 2017 Regional Volunteer of the Year Award to Glenda Schlosser (left). Photo credit: Kelley Orban

2017-18 Calendar of Events

2nd Annual CPBI Saskatchewan Golf Tournament

Tuesday, September 12, 2017

Royal Regina Golf Club, Regina

[Click here for details or to register!](#)

Luncheon/Breakfast Seminars

Regina: Double Tree by Hilton

Thursday, October 19, 2017 – Luncheon

Thursday, November 16, 2017 - Breakfast

Thursday, January 11, 2018 – Luncheon

Thursday, February 15, 2018 – Breakfast

Thursday, March 15, 2018 – Luncheon

Thursday, May 17, 2018 - Luncheon

Saskatoon: Radisson Hotel Saskatoon

Wednesday, October 18, 2017 – Luncheon

Wednesday, November 15, 2017 – Luncheon

Wednesday, January 10, 2018 – Luncheon

Wednesday, February 14, 2018 – Luncheon

Wednesday, March 14, 2018 – Luncheon

Wednesday, May 16, 2018 - Luncheon

Member Appreciation/Networking Event

November 8, 2017 in Saskatoon. Details to follow.

Administration of Capital Accumulation Plans (ACAP) 2

November 20 to 24, 2017 in Regina.

[Click here for details!](#)

Pension Plan Administration Certificate (PPAC) 3

February 26 to March 2, 2018 in Regina.

[Click here for details!](#)

2018 CPBI Saskatchewan Regional Conference "Ignite & Energize: Powering the Future"

April 17, 18 & 19, 2018 at Double Tree by Hilton in Regina

CPBI FORUM 2018

June 4, 5 & 6, 2018 in Quebec City

Watch for more exciting details about our 2017-18 Calendar of Events!

2017-18 Sponsorship Opportunities



CPBI Saskatchewan is pleased to announce our 2017-18 sponsorship program. Once again, this year's sponsorship package is designed to allow you the opportunity to maximize your sponsorship dollars. If you choose the option to sponsor both the 2017-18 program year and the 2018 regional conference, you are eligible to receive a **10% discount** if you apply by September 30, 2017. The package also includes opportunities to sponsor our 2nd annual **Golf Tournament** (apply by September 1, 2017).

We encourage you to take advantage of this opportunity to promote your brand to a diverse group of benefits, pension, investment and human resource professionals in the Saskatchewan region. With the various sponsorship packages available, your company has the flexibility to achieve its marketing objectives and stay within budget. Each package guarantees you excellent and ongoing recognition building up to and during the events.

The success of our programs and conferences is credited largely to our sponsors who lend their names and financial support. Join us for another exciting year of educational and promotional opportunities.

[Click here to download the Sponsorship Brochure and Application Form.](#)

CPBI Membership

Purchase your 2018 CPBI Membership now and receive a complimentary CPBI membership for the remainder of 2017!

[Click here](#) to learn about the advantages of being a CPBI member.

2017-18 CPBI Saskatchewan Regional Council & Committees

Chair: Dara Sewell-Zumstien, Public Employees Benefits Agency

Vice-Chair: Vacant

Treasurer: Dan Bolan, Great-West Life

Secretary: Kelley Orban, Saskatchewan Healthcare Employees' Pension Plan

Past-Chair: Alana Shearer-Kleefeld, 3sHealth

National Board Representative: Doug Volk, Teachers' Superannuation Commission

Council Members:

Narinder Kempa, The Co-operators

Sylvia Rempel, University of Saskatchewan

Nikki-Lynn McKeague, Saskatchewan Teachers' Federation

John Salmond, Group Medical Services

Troy Shanks, Blackstone Insurance, Benefits & Bonding Inc.

Andrea Johnson, Miller Thomson LLP

Colette Wagner, Möbius Benefit Administrators Inc.

Chad Corbin, Saskatchewan Blue Cross

Raymond Parsley, City of Saskatoon General Superannuation Plan

Jeremy Sloan, BMA Benefits Division

Finance Committee

Chair, Dan Bolan

Kelley Orban

Chad Corbin

Dara Sewell-Zumstien

Communications Committee

Chair, John Salmond

Alana Shearer-Kleefeld

Dara Sewell-Zumstien

Professional Development Programs Committee

Chair, Troy Shanks
Vice-Chair, Nikki-Lynn McKeague
Narinder Kempa
Alana Shearer-Kleefeld
Andrea Johnson
Colette Wagner
Dara Sewell-Zumstien

Governance and Nominating Committee

Chair, Alana Shearer-Kleefeld
Doug Volk
Nikki-Lynn McKeague
Andrea Johnson
Dara Sewell-Zumstien

Sponsorship and Membership Committee

Chair, Narinder Kempa
Kelley Orban
Troy Shanks
Chad Corbin
Dara Sewell-Zumstien

Conference Planning Committee

Chair, Kelley Orban
Vice-Chair, Jeremy Sloan
Doug Volk
Narinder Kempa
Alana Shearer-Kleefeld
Dan Bolan
Raymond Parsley
Gail Genest, Saskatchewan Pension Plan
Dara Sewell-Zumstien

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