



Charting unknown waters



CPBI Atlantic Regional
Virtual Conference

CONFERENCE REGISTRATION PACKAGE

OCTOBER 8, 2020 ▪ JOIN US FROM ANYWHERE!

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CONFERENCE COMMITTEE

Co-Chairs

Leanne O'Reilly, Pippy Insurance and Financial
Steve Cameron, Medavie Blue Cross

Committee

Carolyn Roberts, Province of New Brunswick
David Tutty, Manulife Financial
Diane Macdonald, Canada Life
Jeff Alexander, Morneau Shepell
Jennifer Urquhart, NSHEPP
Tara Anstey, Mercer
Ron Cashin, Desjardins Insurance
Virginia Wickstrom, University of Prince Edward Island

Conference Volunteers

Claudette Richard, Assumption Life
Jill Cameron, Holland College
Kimberly Reynolds, Medavie Blue Cross
Theresa Rose, Green Shield Canada

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VIRTUAL CONFERENCE SCHEDULE

Thursday, October 8, 2020

10:30 AM Atlantic <i>9:30 AM Eastern</i>	CPBI Atlantic AGM All CPBI Atlantic Members Welcome
11:00 AM Atlantic <i>10:00 AM Eastern</i>	Conference Welcome
11:15 AM - 12:30 PM Atlantic <i>10:15 - 11:30 AM Eastern</i>	Change Management for Benefit and Pension Plans
12:30 - 12:55 PM Atlantic <i>11:30 - 11:55 AM Eastern</i>	Break and Refresh
1:00 - 2:00 PM Atlantic <i>12:00 - 1:00 PM Eastern</i>	Insights & Investigations From The Field Benefits Breakout Session
2:00 - 2:10 PM Atlantic <i>1:00 - 1:10 PM Eastern</i>	Break and Refresh
2:15 - 3:15 PM Atlantic <i>1:15 - 2:15 PM Eastern</i>	ESG Integration - Challenges and Opportunities Pension & Investment Breakout Session
3:15 - 3:25 PM Atlantic <i>2:15 - 2:25 PM Eastern</i>	Break and Refresh
3:30 - 4:30 PM Atlantic <i>2:30 - 3:30 PM Eastern</i>	Conference Keynote with Chantal Hébert
4:30 PM Atlantic <i>3:30 PM Eastern</i>	Virtual Social

**Webinar login instructions will be provided one week prior to conference*

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CHANTAL HÉBERT

Conference Keynote Speaker

2020 can only be described as turbulent and more is yet to come. For a thoughtful presentation on what may be on the horizon, Chantal will provide her thoughts on all things 2020 and beyond. What's in store for the last quarter of 2020, given the looming US election, COVID's second wave and Canada's minority government? Nothing will be left on the table as we draw on Chantal's political background for this session.

Chantal Hébert is a national affairs writer with the Toronto Star and a guest columnist for L'Actualité. She is 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 on television and Gravel le matin on Montreal radio.

Ms Hébert began her career in Toronto as a reporter for the regional newsroom of Radio-Canada in 1975 before moving on to Parliament Hill for Radio-Canada radio. She has served as parliamentary bureau chief for Le Devoir and La Presse.

Hébert is a graduate of Glendon College, York University. She is a Senior Fellow of Massey College at the University of Toronto and hold honorary degrees from a dozen Canadian universities. She is a recipient of two Asia-Pacific media fellowship (Malaysia and Japan). She is the 2005 recipient of the APEX Public Service Award. In 2006, she received the Hy Solomon award for excellence in journalism and public policy as well as York University's Pinnacle Achievement Bryden Alumni award. In 2012, she was appointed to the Order of Canada. Her second book: *The Morning After*, dealing with the 1995 Quebec referendum, was published simultaneously in both official languages in 2015. In 2019, her peers in the Parliamentary Press Gallery awarded her the Charles Lynch award for her longstanding coverage of national issues.

CHANGE MANAGEMENT FOR BENEFIT AND PENSION PLANS

Panel:

Benefits Plan Sponsor
Pension Plan Sponsor
Consultant

Alexandra Chamberlain, Atlantic Central & League Savings and Mortgage
Peter Head, Provident¹⁰
Katherine Burgess, AON

The pension and benefits industry is changing at a fast pace: technology keeps evolving, customer trends are changing, new market regulations are being launched on a regular basis, and businesses have to cope with unprecedented global crises such as the COVID-19 pandemic that keeps spreading.

Many of the world's most successful organizations are those that can quickly and effectively adapt to rapidly changing environments. Implementing meaningful and proactive change within an organization can feel like an uphill battle, making these changes stick can prove to be even more challenging. Organizations that resist change can quickly find themselves left behind as new competition, new trends, and new technology emerge in the pension and benefits industry. Please join our panel as we explore some best practices and real challenges experienced in change management.

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INSIGHTS & INVESTIGATIONS FROM THE FIELD

A Benefits Breakout Session

Speakers: **Hugh Wright**, McInnes Cooper
Shelley Frohlich, Sunlife

Fraud is constantly evolving. In the past, preventing and detecting benefits fraud involved manual processes - essentially following a paper trail. Today, benefits fraud is more complex - from life and disability to health and dental - there is an increasingly more sophisticated approach critical to establishing comprehensive fraud management and prevention programs. In these uncertain times how, or will, things look differently with COVID-19?

- What role do stakeholders play in education, prevention, and detection of benefit fraud?
- What are best practices in fraud prevention, mitigation, response, and recovery?
- How are fraudulent claims impacting plan cost and sustainability, and questions plan sponsors should ask.
- How are insurers working collaboratively to tackle benefits fraud?
- What will the impact be on benefit fraud as a result of COVID-19?

Using examples from the field, our legal expert will identify legal responsibilities and relationships amongst the various benefit plan stakeholders, impacts of fraud on these relationships, and how plan sponsors can mitigate and allocate legal risk.

ESG INTEGRATION - CHALLENGES AND OPPORTUNITIES

A Pension & Investment Breakout Session

Speakers: **Judy Cotte**, ESG Global Advisors
Hyewon Kong, Investment Management Corporation of Ontario (IMCO)

Before the global pandemic, ESG investing was a hot topic for investors of all sizes, in all parts of the world. What impact has the global pandemic had on this trend, and has the world of ESG investing had to “pivot” with their integration strategies?

Join our panel of industry experts to learn about the opportunities available and challenges faced when integrating ESG factors into the investment decision-making process. Additional focus will include how the current environment created by the COVID-19 pandemic is creating further considerations for ESG integration.

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CONFERENCE EXTRAS

Virtual Social

Our conference day will end as it normally does, with an opportunity for a fun social event. Of course, it goes without saying that the only difference this year is we will be connecting virtually! ***Stay tuned for an exciting event update, as we charter the unknown waters of our first ever Virtual Social.***

Cheers and we look forward to “seeing you” in October!

Networking Opportunities

Our conference committee is hard at work developing ways to virtually engage our conference attendees in meaningful ways throughout our conference.

Early Bird Member Perks

The CPBI Atlantic Regional Conference has a reputation for our added touches and this year in particular, we would like to recognize CPBI Members for their ongoing support.

CPBI members who register before the Early Bird deadline can take advantage of Special Corporate Group Rates. Invite colleagues and/or clients to attend as your guest. Your guests will be treated to high quality education sessions, a virtual social and receive all our special conference member perks!

- **Special Member Corporate Group of 6 (for price of 5)**
- **Special Member Corporate Group of 10 (for price of 8)**

With the help of our sponsors, the first 200 CPBI Members who register before the Early Bird deadline can expect to receive a special CPBI Atlantic delegate package in the mail. Be sure to indicate a proper mailing address (home or office) when you register.

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REGISTRATION INFORMATION

Registration

To register online using a credit card or cheque, please go to:

<http://www.cpbi-icra.ca/Events/Details/Atlantic/2020/10-07-2020-CPBI-Atlantic-Regional-Conference>

Webinar login instructions will be provided one week prior to conference.

Registration Fees

Early Bird Conference Fee* July 10, 2020 - September 8, 2020

- Early Bird Member \$75.00
- Early Bird Member Corporate Group of SIX \$375.00 (Special Price: 6 registrations for the price of 5)
- Early Bird Member Corporate Group of TEN \$600.00 (Special Price: 10 registrations for the price of 8)

- Early Bird Non-Member \$137.50

With the help of our sponsors, the first 200 CPBI Members who register before the Early Bird deadline can expect to receive a special CPBI Atlantic delegate package in the mail.

Regular Conference Fee* September 8, 2020 - October 8, 2020

- Member \$100.00
- Non-Member \$175.00

** All prices are subject to applicable taxes.*

Cancellation Policy

Conference cancellations received in writing prior to September 1, 2020 will be refunded in full. If received in writing between September 2, 2020 and October 1, 2020, any conference cancellations will be subject to a \$25.00 penalty. There will be no refunds for any conference fee received after October 1, 2020 for any reason. Substitutions may be made at no cost. CPBI assumes no liability for changes in program, social activities, event dates or venue.