



CPBI
SASKATCHEWAN
REGION

CANADIAN PENSION & BENEFITS INSTITUTE



CPBI Saskatchewan News

Summer Newsletter - July/August 2015

In This Issue

- Message from the Past-Chairperson
- Highlights from the CPBI Saskatchewan Regional Conference "Connections & Creativity"
- Welcome!
 - New Chairperson
 - New Council Member
- Regional Volunteer of the Year: Bob Wilhelms
- 2015-16 Calendar of Events
- 2015-16 Sponsorship Opportunities
- CPBI Membership
- 2015-16 CPBI Saskatchewan Regional Council & Committees
- Would you like to get involved?

Message from the Past-Chairperson



Another summer is in full swing with many enjoying our warm sunny Saskatchewan days; it allows myself time to reflect on a very busy past year within CPBI and thank the efforts of those who have made CPBI what it is.

CPBI Saskatchewan Region currently has over 275 members and continues to grow. It was not that many years ago we were declining in membership and were below 200. Our region is in a strong financial position, which allows our programming committee the ability to secure national and international speakers to provide their perspective on many of the emerging issues as they relate to Saskatchewan.

Along with a growing membership, we attract many non-members to our sessions. This allows CPBI to illustrate that we are a membership organization that is committed to providing outstanding education sessions, networking opportunities with peers within your industry, and gain insight on the issues that affect Saskatchewan today and in the future. Many non-members have been looking at our value and committing to joining CPBI; for that, we thank you.

I would like to acknowledge and thank the countless volunteer hours given by our regional Council. It is their effort which makes each and every event run so smoothly. Their commitment to securing professional speakers and timely topics has not gone unnoticed. Council has undertaken many roles and responsibilities which has made life as the Chairperson very easy. Some may refer to a Chair's role as trying to herd cats;

however, over the past 2 years, I can share that it has been an honor and a pleasure to be associated with CPBI. Their professionalism, dedication and commitment, along with outstanding ideas from each and every Council member, have allowed CPBI Saskatchewan to continue to grow in membership and prestige. The energy and passion of these men and women, from all sectors of the industry, is truly amazing to be part of. I will look back fondly on my years with Council and cherish the relationships that have been built.

It gives me great pride to welcome our new incoming Chair, Alana Shearer-Kleefeld, and wish her nothing but success in her role. Having the opportunity to work alongside Alana for the past years, I have seen her strong leadership and creative side hard at work. This will take CPBI Saskatchewan Region to new heights under her role as Chair. I want to thank Alana for the many hours she contributed as Vice Chair and her willingness to always step up when I wasn't able to attend a meeting. Her contributions are greatly appreciated and I personally appreciate her commitment. I know the Saskatchewan Region is in a better position with her strong leadership, a dedicated Council, and a tireless administrator who holds everything together.

On behalf of the Saskatchewan Regional Council of CPBI, I wish everyone a relaxing and enjoyable summer with family and friends. With the Canadian dollar at decade lows, this is a great opportunity to enjoy everything Saskatchewan has to offer. I look forward to seeing everyone at the upcoming sessions in the fall.

Bob Wilhelms

Past-Chairperson

CPBI Saskatchewan Regional Council

Highlights from the CPBI Saskatchewan Regional Conference "Connections & Creativity"



On April 22 & 23, 2015, CPBI Saskatchewan Regional Council hosted its 5th annual conference at the Delta Bessborough Hotel, Saskatoon's most distinguished landmark.

The planning committee was pleased to receive accolades from delegates both during and after the conference for the high level of professionalism exhibited and the great value gained from the conference once again this year.

Plenaries:



David Blodgett, President and CEO of Group Medical Services, opened the conference with a discussion about the emerging Silver Tsunami and the "**sacred trust**" between government, insurers and plan sponsors. Drawing on his experience and knowledge of the Canadian life and health insurance industry, David very effectively laid the foundation for the entire conference.



Curt Steinhurst from the Center for Generational Kinetics gave a highly entertaining talk about making a multigenerational workforce a competitive advantage. Everyone in the room could relate to the various elements of Curt's generational descriptions and anecdotes. It was also fascinating to hear these messages directly from a Gen Y himself! In addition to being a highly personable, engaging, and funny speaker, Curt's strategies for **cross-generation communication** held great meaning and relevance for attendees.



John Gormley, Broadcaster, Lawyer, National Bestselling Author, and Host of Saskatchewan's Top-Rated Radio Talk Show "John Gormley Live", provided an overview of Saskatchewan's economic changes over the past decade and the emerging population trends that have challenged and inspired policy makers, from health care to charting urban growth. John's presentation was educational for delegates from both within and outside of Saskatchewan. He provided a clear description of how Saskatchewan has evolved over the past decade and why we are "**Canada's Turnaround Province**".



Darren Ulmer, Cancer Survivor and Financial Advisor, gave a moving talk about his personal journey with Cancer, and spoke about the important role that **critical illness insurance** played in his recovery. He provided first hand insight on how much a critical illness truly costs, and how critical illness insurance can help protect an employee's financial future. Darren passionately delivered his very strong and heartfelt message.



"How many of you are completely comfortable with calling yourself a leader?" Drew Dudley of Nuance Leadership Inc. enthusiastically spoke about **everyday leadership** in a way that was both inspirational and practical. His anecdotes and ideas entertained and captivated attendees, while providing a very clear and definable message on how to become a better leader. Dynamic speaker, great presentation, powerful message.

Networking:



Networking is one of the great opportunities the Conference provides every year. At the end of the first day of conference, CPBI Saskatchewan Regional Council hosted a Wine and Cheese Networking & Member Appreciation Event. Warm spring weather enabled delegates to mingle outside on the terrace.



The networking then continued at The Samurai Japanese Restaurant where the chefs performed Teppanyaki style of cooking. It was a wonderful evening with a congenial atmosphere and exceptional food... conducive to great conversation among colleagues.

Pension Breakout Sessions:



Julianna Spiropoulos, Associate Partner at Aon Hewitt, spoke about how plan sponsors can identify and **manage key risks in their DB plans**, such as longevity risk, mortality risk, and investment risk.



Robin Damm, Senior Retirement Consultant at Towers Watson, and Dany Dumas, Senior Communication and Change Management Consultant at Towers Watson, spoke about creative new approaches to getting plan members more **engaged in their DC plan**. They emphasized that including customized approaches for different generational audiences with employee groups is key.



Is indexation a pension benefit? That was the question for a debate between two pension lawyers: Jana Steele, Partner, Osler, Hoskin & Harcourt LLP, and Amanda Darrach, Partner, Cavalluzzo Shilton McIntyre Cornish LLP. There were cohesive arguments from both sides. In the end, we could call that debate a draw!



In their presentation, John Hallett, Assistant Director, Pension Programs, Public Employees Benefits Agency, and Leah Fichter, Director, Pensions Division, Financial and Consumer Affairs Authority of Saskatchewan, examined **DC Pension Plans Guideline No. 8** - the theory and the practice. They provided great information on decumulation from a plan member's perspective.



David Zanutto, partner at Mercer, discussed whether or not alternative investments can complement an investor's public equity portfolio. He also provided some great implementation **options for alternative investments**.

Benefits Breakout Sessions:



Kim Siddall, Associate Vice President at Aon Hewitt, and Kevin Bell, Senior Consultant at Aon Hewitt, shared how employers can get ahead of the benefit claims cost curve and engage healthy behaviors in employees. They provided great insights on how to **integrate data to manage benefit programs and employee health effectively**. The idea of "game-i-fication" was thought provoking.



Susan B. Barber, Partner at McDougall Gauley LLP, provided an interesting perspective on the **accommodation** of "family status" and medical marijuana in the workplace. Susan examined some of the case law that address these issues.



What is meant by **mental health versus mental illness**? Carmen Bellows, Senior Consultant, Mental Health, at Sun Life Financial, discussed how reducing stigma improves stay at work and return to work strategies.



Mark Lutzer, Supervisor, Investigation Services, Risk Management, at Manulife, examined the emerging trends in **benefits fraud and abuse**. Ultimately, "Plan design is critical when it comes to preventing benefits fraud", says Mark.



Brian Lindenberg, Senior Partner at Mercer, explored trends within benefits and challenged our thinking on **future benefit plan designs**. He mapped out how plan sponsors can look at benefit trends and connect the dots along the way.

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:

2015 Conference Sponsors

Diamond: Desjardins Insurance Pyramis Global Advisors	Silver: Aon Hewitt CIBC Mellon	Bronze: Industrial Alliance Mercer
Gold: Triasima Saskatchewan Blue Cross The Co-operators Group Medical Services	Sun Life Financial Manulife Homewood Health	Media: Benefits and Pensions Monitor AV: Freeman Audio Visual

We would like to extend our appreciation to **Joe Hornyak**, Executive Editor of Benefits and Pension Monitor (BPM) magazine, who attended the conference for his 5th consecutive year. Once again, Joe wrote and published highlights about our conference which can be viewed at this link: http://www.bpmmagazine.com/benefits_news.php?date=2015-04-29 (scroll down a bit to April 23rd and 24th). 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 huge "Thank you" is extended to **Trina Kistner** (left) for taking on the role as Chair of the Conference Planning Committee, and for her dedication and commitment to this role. As well, we extend another huge "Thank you" to all Council members who served on the Conference Planning Committee and for their countless hours and efforts.



Lastly, we extend a huge "Thank you" to all of you for supporting our event for the 5th year in a row! It is the generosity of our sponsors and the commitment of our delegates that made Connections & Creativity a resounding success.

Photo Credits: Sheryl Armstrong and Kendra Dumont

Welcome!

CPBI Saskatchewan is pleased to introduce our new Regional Council Chair, Alana Shearer-Kleefeld.



Alana Shearer-Kleefeld is the Manager, Benefits Administration with Health Shared Services Saskatchewan (3sHealth). After three and a half years of managing the group business development for Manitoba and Saskatchewan at The Co-Operators (2010-2014), Alana returned to the employee benefits area at 3sHealth where she leads a benefits administration team supporting the healthcare industry in Saskatchewan. Prior to joining 3sHealth in 2004 (formerly the Saskatchewan Association of Health Organizations), Alana worked for several insurance companies including Crown Life, Canada Life, Great West Life and Confederation Life. Alana has been A CPBI Member since 2006, and joined the Saskatchewan Regional Council the very same year; that's dedication for you! Since joining Council, Alana has filled a variety of roles including: Executive Secretary, Chairperson of several committees within Council including two terms as the Saskatchewan Regional Council Conference Chair, member of a variety of National Council committees, and two terms as the Saskatchewan Regional Council Vice-Chair. Through her years of being involved in CPBI, both at the regional and national levels, and along with her desire to give back to the benefits community, Alana brings a unique perspective and commitment to supporting the Council in providing high-quality and professional education events in the region.

CPBI Saskatchewan Regional Council also has the privilege of introducing one new Council Member. Please join us in welcoming Kelley Orban.



Kelley Orban is Senior Director of Stakeholder Relations at the Saskatchewan Healthcare Employees' Pension Plan (SHEPP), the province's largest defined benefit pension plan. She has spent most of her corporate career developing strategies and initiatives to engage customers, employees and other important internal and external stakeholders. A member of SHEPP's senior management team, Kelley leads the organization's human resources, communications and policy areas. Kelley has a Bachelor of Business Administration Degree, a Masters of Business Administration and has held a variety of volunteer positions on Boards, Councils and Forums within the business community. A CPBI member since 2012, Kelley is excited about joining Council and lending her expertise to help support the delivery of high-quality and professional education events to the pension and benefits industry in Saskatchewan.

Regional Volunteer of the Year: Bob Wilhelms



PHOTO: Alana Shearer-Kleefeld, Chair, CPBI Saskatchewan Regional

Bob Wilhelms is a Senior Account Executive for Saskatchewan Blue Cross. Prior to joining Blue Cross, Bob was a Labor Relations Advisor for the City of Regina. He also serves on the Blue Cross Life Advisory Board, held the role of Chairperson for the Regina Civic Employees Pension and Benefits Committee, and was both the Vice Chair and Chair of the Administrative Board for the Regina Civic Employees Superannuation & Benefits Plan. Bob is a respected professional within the industry and a leader in the community. His other passions include spending time with family, golf, home renovations, travel and supporting his beloved Saskatchewan Roughriders. Bob is also an active volunteer for the MS Society.

Council (left) presents the 2015 Regional Volunteer of the Year Award to Bob Wilhelms (right).
Photo credit: Sheryl Armstrong

Bob joined CPBI Saskatchewan Regional Council in 2005. For the past 10 years, Bob's contributions have been an integral part of the growth and success Saskatchewan Region has experienced. Bob has served our Council as Chair, Vice Chair, Treasurer, and as our National Board Representative for 4 years. Bob was the very first Chair of the Saskatchewan Regional Conference in 2011, an event which laid the foundation for our renowned annual event. In addition, Bob has served on multiple committees both in Saskatchewan Region and at the National Level. He is always willing to be an MC, or take on any task that needs to be done to make a CPBI event a success. Bob has truly made an impact in the Region, but is known across Canada for his jovial presence and for always representing Saskatchewan with passion and pride.

2015-16 Calendar of Events

Luncheon/Breakfast Seminars

Regina: Delta Regina Hotel - **Note change in venue!**

Thursday, October 15, 2015 – Luncheon

Thursday, November 19, 2015 – Breakfast

Thursday, January 14, 2016 – Luncheon

Thursday, February 11, 2016 – Breakfast

Thursday, March 10, 2016 – Luncheon

Saskatoon: Radisson Hotel Saskatoon

Wednesday, October 14, 2015 – Luncheon

Wednesday, November 18, 2015 – Luncheon

Wednesday, January 13, 2016 – Luncheon

Wednesday, February 10, 2016 – Luncheon

Wednesday, March 9, 2016 – Luncheon

Pension Plan Administration Certificate (PPAC) 1

October 5 to 9, 2015, in Regina

This is the first of three modules through Humber College.

For details or To Register: <http://www.cpbi-icra.ca/Events/Where/Region/Saskatchewan>

Certificate in Employee Benefits

November 16 to 20, 2015, in Regina

This is the first of two modules through Humber College.

For details or To Register: <http://www.cpbi-icra.ca/Events/Where/Region/Saskatchewan>

Administration of Capital Accumulation Plans (ACAP) 2

January 25 to 29, 2016, in Regina

This is the second of two modules through Humber College.

For details or To Register: <http://www.cpbi-icra.ca/Events/Where/Region/Saskatchewan>

2016 CPBI Saskatchewan Regional Conference "Evolution through Innovation"

April 13 & 14, 2016 at the Delta Regina Hotel

Watch for more exciting details about our 2015-16 Calendar of Events!

2015-16 Sponsorship Opportunities



CPBI Saskatchewan is pleased to announce our 2015-16 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 2015-16 program year and the 2016 "*Evolution through Innovation*" regional conference, you are eligible to receive a **10% discount** if you apply by September 15, 2015.

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.

To download the Sponsorship Brochure and Application Form:

<http://www.cpbi-icra.ca/News-Awards/News/2015/07/20/Sponsorship-Opportunities>

CPBI Membership

Purchase your 2016 CPBI Membership now and receive a complimentary CPBI membership for the remainder of 2015.

To learn about the advantages of being a CPBI member:

<https://www.cpbi-icra.ca/CPBI-Membership/Members-Advantages>

2015-16 CPBI Saskatchewan Regional Council & Committees

Chair: Alana Shearer-Kleefeld, 3sHealth

Vice-Chair: Christine Taylor

Treasurer: Glenda Schlosser, City of Regina

Secretary: Trina Kistner, Sun Life Financial

Past-Chair: Bob Wilhelms, Saskatchewan Blue Cross

National Board Representative: Doug Volk, Teachers' Superannuation Commission

Council Members:

Narinder Kempa, The Co-operators
Don Rowell, CUMIS Group Ltd.
Sylvia Rempel, University of Saskatchewan
Tony Whitworth, Board of Trustees, City of Saskatoon
Bud Anderson, 3sHealth
Dara Sewell-Zumstien, Public Employees Benefits Agency
Sheryl Armstrong, Hundseth Power Line
Kendra Dumont, University of Saskatchewan
Kelley Orban, Saskatchewan Healthcare Employees' Pension Plan

Finance Committee

Chair, Glenda Schlosser
Bob Wilhelms
Christine Taylor
Tony Whitworth
Doug Volk
Alana Shearer-Kleefeld

Professional Development Programs Committee

Chair, Sheryl Armstrong
Sylvia Rempel
Glenda Schlosser
Dara Sewell-Zumstien
Bud Anderson
Kelley Orban
Alana Shearer-Kleefeld

Governance and Nominating Committee

Chair, Bob Wilhelms
Doug Volk
Narinder Kempa
Christine Taylor
Kelley Orban
Alana Shearer-Kleefeld

Communications Committee

Chair, Don Rowell
Dara Sewell-Zumstien
Kelley Orban
Alana Shearer-Kleefeld

Sponsorship and Membership Committee

Chair, Narinder Kempa
Don Rowell
Glenda Schlosser
Kendra Dumont
Alana Shearer-Kleefeld

Conference Planning Committee

Chair, Bud Anderson
Vice-Chair, Kendra Dumont
Trina Kistner
Don Rowell
Glenda Schlosser
Narinder Kempa
Sheryl Armstrong
Dara Sewell-Zumstien
Sylvia Rempel
Lee Anne Harder
Alana Shearer-Kleefeld

Would you like to get involved?

If you are interested in volunteering on Council, participating on a committee, or providing a presentation at one of our seminars, let us know!

Please send your questions and submissions, along with your contact information, to our regional administrator, Karen Lovelace, at saskatchewan@cpbi-icra.ca, or to one of our council members.

A strong, active Council means high-quality professional development programs for Saskatchewan CPBI members.

Thank-you for considering volunteering with CPBI.

Connect with us!

Email: saskatchewan@cpbi-icra.ca

Phone: (306) 757-1013

Website: www.cpbi-icra.ca

LinkedIn: CPBI Saskatchewan

Twitter: @CPBISask