

# 2017 ATLANTIC REGIONAL CONFERENCE

OCTOBER 4-6, 2017

ST. JOHN'S CONVENTION CENTRE

ST. JOHN'S, NL



**BETWEEN A ROCK AND A HARD PLACE:**  
*LEARNING TO EMBRACE DISRUPTION*

## 2017 CONFERENCE COMMITTEE

### CO-CHAIRS

**JEFF ALEXANDER**, Morneau Shepell

**RON CASHIN**, Desjardins Insurance

### COMMITTEE

**TARA ANSTEY**, Mercer

**DAVID HARDING**, Industrial Alliance

**KEVIN HOLLIS**, Belmont Health & Wealth

**LEANNE O'REILLY**, Pippy Insurance & Financial

**TERRY TAYLOR**, TRIO

**DAVID TUTTY**, Sobeys Inc.



## SCHEDULE AT A GLANCE

### WEDNESDAY, OCTOBER 4<sup>TH</sup>

10:00 a.m. - 6:00 p.m.	Registration
10:00 a.m. - 4:00 p.m.	Golf – Clovelly Golf Course
12:30 p.m. - 4:30 p.m.	Alternate Activity – Newfoundland Style Discovery Hunt
6:00 p.m. - 7:00 p.m.	Reception
7:00 p.m.	Lobster Dinner & Entertainment Featuring Newfoundland and Labrador Showcase – presented by <i>The Spirit of Newfoundland</i>

### THURSDAY, OCTOBER 5<sup>TH</sup>

7:00 a.m. - 8:15 a.m.	Breakfast
7:00 a.m. - 6:00 p.m.	Registration Desk Open
8:15 a.m. - 8:30 a.m.	Conference Opening
8:30 a.m. - 9:30 a.m.	Forum A
9:30 a.m. - 9:45 a.m.	Break
9:45 a.m. - 10:45 a.m.	Sessions 1 & 2
10:45 a.m. - 11:00 a.m.	Break
11:00 a.m. - 12:00 p.m.	Sessions 3 & 4
12:00 p.m. - 1:15 p.m.	Lunch
1:15 p.m. - 2:15 p.m.	Forum B
2:15 p.m. - 2:30 p.m.	Break
2:30 p.m. - 3:30 p.m.	Sessions 5 & 6
3:30 p.m. - 3:45 p.m.	Break
3:45 p.m. - 4:45 p.m.	Sessions 7 & 8
6:00 p.m. - 7:00 p.m.	Reception
7:00 p.m.	Dinner & Entertainment Featuring Comedian John Sheehan
10:00pm	Late Night Reception Featuring “The Newfoundland Duo”

### FRIDAY, OCTOBER 6<sup>TH</sup>

7:00 a.m. - 8:30 a.m.	Breakfast
8:30 a.m. - 8:45 a.m.	AGM
8:45 a.m. - 9:00 a.m.	Closing Remarks
9:00 a.m. - 10:00 a.m.	Forum C
10:00 a.m. - 10:15 a.m.	Break
10:15 a.m. - 11:15 a.m.	Forum D
11:30 a.m.	Lunch and Departure

## FORUM DESCRIPTIONS

### FORUM A – THURSDAY MORNING

#### WHAT'S NEXT FOR YOU? A LOOK THROUGH THE LENS OF A FUTURIST

JESSE HIRSH

FUTURIST & DIGITAL STRATEGIST



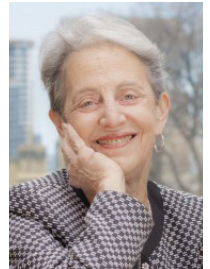
Because of the impact technology has on our relationship with the world, Jesse believes that it should be used in responsible and creative ways. He encourages audiences to use technology as the catalyst for collaboration, education, and growing thriving organizations. A speaker who brings excitement and curiosity to technical topics, Jesse is able to synthesize abstract concepts into digestible and actionable pieces of information. His insightful presentations feature valuable unique strategic insights relative for each audience.

### FORUM B – THURSDAY AFTERNOON

#### TRUMP – THE GREAT DISRUPTOR?

DR. JANICE STEIN

MUNK SCHOOL OF GLOBAL AFFAIRS, UNIVERSITY OF TORONTO



Trump is trying to disrupt the liberal international order that the United States put in place over decades. This was not supposed to happen. Why is it happening and how disruptive is Trump? Janice Stein will look ahead at the dangers and opportunities in an age of disruption and look at the consequences for institutional investors who have to navigate these choppy waters.

Stein is the Belzberg Professor of Conflict Management in the Department of Political Science and the Founding Director of the Munk School for Global Affairs at the University of Toronto. She is a Fellow of the Royal Society of Canada and an Honorary Foreign Member of the American Academy of Arts and Sciences.

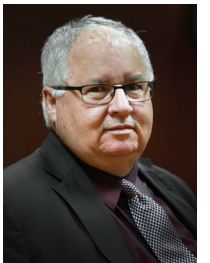
She is the co-author, with Eugene Lang, of the prize-winning work, *The Unexpected War: Canada in Kandahar*, and her most recent book is *Diplomacy in the Digital Age*. Professor Stein was the Massey Lecturer in 2001, and a Trudeau Fellow. She is a member of the Order of Canada and the Order of Ontario. She has provided commentary for networks such as CBC, CTV, TVO and CNN, and columns and comment for *The Globe and Mail* and *The National Post*.

### FORUM C – FRIDAY MORNING

#### OVERCOMING DISRUPTION – AN ATLANTIC PERSPECTIVE

DR. WADE LOCKE

MEMORIAL UNIVERSITY OF NEWFOUNDLAND



Disruption and challenges are not new to Newfoundland and Labrador. With the recent downturn in oil prices, the large debt facing the province, an aging demographic, as well as the pending completion of the Muskrat Falls mega-project... Newfoundlanders know that there are no smooth waters ahead, but instead, rough seas that need to be navigated properly.

Dr. Locke will focus on the lessons learned from these issues and will give his thoughts on some concepts to help normalize disruption. He will also shed light on how these variables relate specifically to Newfoundland economy, and the Atlantic economy in general.

Dr. Wade Locke is a Full Professor of Economics at Memorial University of Newfoundland and is currently the Academic Head for the Department of Economics, Memorial University. He specializes in the Newfoundland and Labrador economy, resource economics, public finance, public policy, innovation indicators, productivity, economic impact assessment and cost-benefit analysis.

## FORUM DESCRIPTIONS

### FORUM D – FRIDAY MORNING

#### DISRUPTIVE INNOVATION IN HEALTHCARE

**DR. BRIAN GOLDMAN**

EMERGENCY ROOM PHYSICIAN, BESTSELLING AUTHOR & MEDICAL WATCHDOG



Dr. Goldman's style is earnest, heartfelt and sincere. He has a passion for compassion and he makes complex medical issues digestible for audiences by personalizing medicine and the human frailties of his profession. He is unafraid to address tough or controversial issues head on in a comprehensive way.

Dr. Goldman is a highly regarded emergency physician at Mount Sinai Hospital in Toronto. He is also the host of the CBC award-winning radio show *White Coat, Black Art*, where he takes listeners behind the scenes of hospitals and doctor's offices.

In his bestselling book, *The Night Shift: Real Life in the ER*, Dr. Goldman takes readers through giddy heights and crashing lows as he works through a typical night shift in one of Canada's busiest ERs. His second book, *The Secret Language of Doctors*, is a biting look at medical slang. It cracks the coded words doctors use in hospital elevators and hallways that reveal what the doctor really thinks about your mother's obesity, your grandfather's dementia or her colleague's competence.



## SESSION DESCRIPTIONS

### SESSION 1

#### **DISABILITY MANAGEMENT: A PLAN SPONSOR CASE STUDY**

SUSAN BELMORE-VERMES, HEALTH ASSOCIATION NOVA SCOTIA

GODFREY JERRY, MANULIFE

Atlantic Canada's underlying demographics, with a rapidly aging population and high rates of chronic disease, have contributed to disability plan costs amongst the highest in the country. Compounding these pressures, access to care is impacting the workforce as a result of physician shortages, rising surgery wait times and access to mental health services. This session will provide an Atlantic Canadian perspective on disability plan management challenges and strategies, and will highlight key learnings from a large Trusteed association plan, representing public and private sector health care employers and employees.

### SESSION 2

#### **THE TRUMP EFFECT – WHAT DOES IT MEAN TO EQUITY MARKETS AND LOW-VOLATILITY INVESTING?**

DR. JEAN MASSON – TD ASSET MANAGEMENT

2017 has undoubtedly been the year of Trump, following his surprising win of the 2016 Election and subsequent inauguration in January 2017. The start of his administration has led to some interesting movement in the equity markets. Has the arrival of a disruptive president impacted low volatility investing?

Join us as Dr. Jean Masson explores the impact of this new administration on the markets, specifically on low-volatility markets. He will challenge prevailing wisdom, and dive into what's happening behind the numbers.

Dr. Masson will also explore why low volatility investing has become so popular, and speak to what the future holds for this style of investing. Together we will explore... "Does Trump Matter?"

### SESSION 3

#### **DIGITAL HEALTH TECHNOLOGY & WELLNESS**

MARY MARTELL, J.D. IRVING, LIMITED

ANDREY FELDMAN, SPROUT

Similar to the way technology has improved banking or the way we connect with family and friends, digital health technology is changing the way employers engage employees in health and wellness. From the integration of wearable technologies and data analytics to the use of social media and online wellness tools, the Canadian digital health landscape is growing exponentially. The session will profile an employer case study in the use of digital health technologies to support wellness across a diverse workforce, and will offer a perspective on the future of digital health applications for the workplace.

## SESSION DESCRIPTIONS

### SESSION 4

#### **A BRAVE NEW WORLD: A PLAN SPONSOR'S UNCONVENTIONAL APPROACH TO ASSET ALLOCATION**

JONATHAN CROFT, MERCER

TERRY TAYLOR, TRIO BENEFITS

In the continuing environment of low interest rates, it is increasingly difficult for pension funds to realize a satisfactory annual investment return while also effectively managing risk. This session outlines how a medium-sized fund employed non-traditional investment strategies to improve its investment performance and enhance its risk management.

### SESSION 5

#### **ADDRESSING THE DRUG MIX – STRATEGIES TO COMBAT LOW VALUE SPEND**

JOHN HERBERT, EXPRESS SCRIPTS CANADA

BARBARA MARTINEZ, THE GREAT-WEST LIFE ASSURANCE COMPANY

LEANNE MACFARLANE, MANAGED HEALTH CARE SERVICES INC.

Making room in the health plan budget for expensive new specialty drug therapies increasingly requires plan sponsors to look for savings opportunities within their existing plans. While the widespread adoption of mandatory generic substitution in recent years has helped mitigate the pace of increase, new strategies are required to ensure longer-term benefit plan sustainability. In this session, a panel of experts from the pharmacy benefit management, insurance and pharmacy sectors will discuss the issue of Drug Mix Waste and strategies to combat low value drug spend.

### SESSION 6

#### **THE DECUMULATION DILEMMA: PLAN MEMBERS HAVE MADE IT TO RETIREMENT, WHAT'S THE NEXT STEP?**

IAN CLAVEAU, INDUSTRIAL ALLIANCE

Plan sponsors assist their members in accumulating assets and benefits towards retirement, but what happens when the plan member actually retires? Plan providers, sponsors and regulators are starting to consider what might be necessary to promote successful outcomes after retirement.

Whether the benefits come from a Defined Benefit Plan or Defined Contribution plan, the challenges are the same: what can Plan Sponsors do to help their retirees, and what is the Plan Sponsor's role and responsibility?

Join Ian Claveau as he explores the options available today, and contrasts tools that Plan Sponsors historically consider versus things that plan sponsors should be considering as they work to assisting the plan member.

## SESSION DESCRIPTIONS

### SESSION 7

#### PHARMACOGENETICS: OPPORTUNITY OR THREAT?

ROD ZBEDIAK, STEWART MCKELVEY

ZAHRA SAKKEJHA, PERSONALIZED PRESCRIBING

NED POJSKIC, GREEN SHIELD CANADA

Advancements in genetic testing offer the promise of new tools to help manage disease and treatment options, including optimized drug therapies. Personal medicine creates both potential opportunities and challenges for employee benefit plans. Notwithstanding passage of Bill S-201, the Genetic Non-Discrimination Act, by the House of Commons, it will take time before the Supreme Court completes its constitutionality reference of the legislation. The legislation may have serious implications for individuals, employers and insurance companies. This session will offer a panel discussion featuring speakers representing the insurance, legal and genetic testing communities and will no doubt raise some very thoughtful considerations for all stakeholders.

### SESSION 8

#### CPBI APPEALS COURT IN SESSION: THE LEGAL UPDATE

COLETTE BARBATI, MORNEAU SHEPELL

JASON MCQUAID, EMERA INC.

“JUDGE JUDY” TBC

From the Skinner Ruling on Medical Marijuana to the Ontario Privacy Commissioner’s ruling on Access to Information, several recent court decisions have changed the landscape for Employers and Employees across the country. Join us as “Judge Judy” listens to several of these cases being “re-tried” in the CPBI Appeals Court. Judge Judy is a no-nonsense arbiter, tough and fair. And she tends to rule the same way the courts actually did.

Judge Judy will hear from a lawyer on each side, and will then give her ruling. This will be a fun and unique look at how the court rulings were made, and the future impact of these rulings on plan sponsors.





## ENTERTAINMENT



### THE NEWFOUNDLAND AND LABRADOR SHOWCASE

*Presented by The Spirit of Newfoundland*

This “time” is essentially a Kitchen Party that is enhanced by spirited staff and singers providing medleys of Newfoundland & Labrador music, humorous dialogue and stories, a fiddler, accordionist, dancers, full stage band and audience participation.



### JOHN SHEEHAN

John Sheehan is one of Newfoundland and Labrador’s hottest comedic stars. He has quickly gained tremendous national recognition and exposure as a stand-up comedian.

Although stand-up is his focus, John is well-known for his talents as an actor, emcee and writer. Everyone relates to his comedy, because you’ve actually had that friend, aunt, brother, or other whacked out relationship. Couple that with legendary Newfoundland timing and its bust-a-gut-loosen-the-top-button-milk-through-your-nose-pee-your-pants-a-little-bit funny. He has appeared at The Halifax Comedy Festival, The St. John’s Comedy Festival, CBC Radio’s The Debaters, and in several television commercials.



### “THE NEWFOUNDLAND DUO”

Entertainment at Late Night Reception - Featuring the vocal talents of two of Newfoundland’s most celebrated, awarded and acclaimed vocalists: Peter Halley and Shelley Neville. Newfoundland, Irish and Contemporary song selections intermixed with Newfoundland humor and dialogue.

Peter Halley has been the Artistic Director of the Spirit of Newfoundland for 20 years. A graduate of Mount Saint Vincent University and Memorial University, he has written, directed and starred in over 40 of the company’s fifty-six productions to date. He has been a professional singer, actor and entertainer for the past two decades and has been actively involved in theatre, television and film. He has been a guest artist with the Newfoundland Symphony Orchestra several times and is a proud recipient of the 2012 Queen’s Diamond Jubilee Medal.

Shelley Neville as a founding member of Spirit of Newfoundland Productions and has been in many productions. Shelley studied singing at Memorial University before moving to Toronto to pursue her career in opera. Her singing has taken her to Italy, Germany, France, England, Ireland, across Canada and to most towns and coves in Newfoundland and Labrador. In 2008, Neville obtained a Master in Music in Performance and Pedagogy and is on the faculty at Memorial University where she is a founding member of the MUN Song Academy. In 2010, she won the Emerging Leaders Award at the NATS conference in Salt Lake City, Utah and is a proud recipient of the 2012 Queen’s Diamond Jubilee Medal.

## ACTIVITIES

### CONFERENCE GOLF TOURNAMENT

The Osprey course at Clovelly Golf Course is routed through the traditional landscape of the Avalon Peninsula, natural wetlands, small scenic ponds and surrounding forest dominated by Black Spruce and Balsam Fir. An excellent mix of holes is showcased by demanding, yet playable Par 5's, short and medium-length Par 3's, and a perfect mix of Par 4's. The course can play differently every day due to the varying winds off the Atlantic which will provide a challenge to every golfer.



The tournament will be run as a scramble event. The CPBI committee will put individual participants on teams balanced by handicap. All players tee off at 10:00 a.m. sharp. Guests accompanying conference attendees are welcome to play in the tournament. A limited supply of rental clubs are available by making arrangements directly with the golf club. Contact the Pro Shop at 709-722-7170. For more information on the Clovelly Golf Course, visit <http://clovelly.ca/>

### NEWFOUNDLAND STYLE DISCOVERY HUNT

Working in teams, participants will be on the hunt with a list of items written in Newfoundland English to locate in the local community and photograph. They will have several riddles to solve that will lead them to interesting locations for photo opportunities. Instructions will lead to a stop at the Newman Wine Vaults for a port and the Newfoundland Chocolate Company for a tasting. They will then continue on to a stop at a pub on George Street for a Pub Olympics competition. Teams are transported around the town by a local taxi company.

### NEWFOUNDLAND TASTING BAR AT LATE NIGHT RECEPTION

Scrunchions and toutons and more! Delegates and their guests will get to sample local foods at this Newfoundland themed tasting bar. Delicious!



# REGISTRATION

**TO REGISTER ON-LINE USING A CREDIT CARD OR CHEQUE, PLEASE GO TO:**

<http://cpbi-icra.ca/Events/Details/Atlantic/2017/10-04-2017-CPBI-Atlantic-Regional-Conference>

Due to limited space, your room may be booked in advance of your conference registration.

However, if your conference registration is not received within one week, your room will be released. You are encouraged to book your room and register for the conference at the same time.

## REGISTRATION FEES

**Early Bird Conference Fee\*** - book by June 30, 2017

**Member** \$700<sup>00</sup>

**Non-Member** \$1,000<sup>00</sup>

**Conference Fee\*** - book after June 30, 2017

**Member** \$800<sup>00</sup>

**Non-Member** \$1,100<sup>00</sup>

**Spouse Fee** - \$275<sup>00</sup> (includes breakfasts, receptions, evening meals and entertainment)

**Golf Fee** - \$125<sup>00</sup> (spouses/guests are welcome to play)

**Newfoundland Style Discovery Hunt** - \$85<sup>00</sup> (spouses/guests are welcome to participate)

*All prices are subject to applicable taxes.*

*\*Includes conference program and meals*

## CANCELLATION POLICY

Conference and activity cancellations received in writing prior to September 6, 2017 will be refunded in full. If received in writing between September 6, 2017 and September 20, 2017, any conference cancellations will be subject to a \$250<sup>00</sup> penalty and activity cancellations will be subject to a 50% penalty. There will be no refunds for any conference or activity fee received after September 20, 2017 for any reason, including weather or travel delays. Substitutions may be made at no cost. CPBI assumes no liability for changes in program, social activities, event dates or venue.

# ACCOMMODATIONS

## ST. JOHN'S, NEWFOUNDLAND AND LABRADOR

One of the oldest cities in North America, St. John's, Newfoundland and Labrador, is a uniquely charming and eclectic destination; cradled in a harbour carved from 500-million-year-old rock, the area is rich with history, rife with culture and sprawling with natural beauty. The Delta St. John's is located in the heart of downtown, just steps from the business and entertainment districts. The hotel is connected by an overhead walkway to the St. John's Convention Centre.

**ACCOMMODATIONS CAN BE BOOKED THROUGH DELTA ST. JOHN'S ON-LINE BOOKING:**

**Click here to book your group rate for Canadian Pension & Benefits Institute.**

In house Reservations:

**Tel: 1-709-570-1614 or 1-888-793-3582 Toll Free**

**Email: dsjreservations@whg.com**

**Please quote booking code: CPI**

### ROOM RATES

- Delta Room . . . . \$209.00
- Delta Premier . . . \$229.00
- Delta Deluxe. . . . \$239.00
- Signature Club . . \$284.00
- Suites. . . . . \$284.00

Room rates are guaranteed until September 3, 2017.



## QUESTIONS

### GETTING THERE

If travelling by air, flights are available through Air Canada, West Jet and Porter.

Air Canada and West Jet have offered discount codes for delegates and guests travelling to the conference. Note that you may find cheaper seats through other promotions offered by the airlines.

Air Canada promo code: **D9V6TCG1** at [www.aircanada.com](http://www.aircanada.com)

West Jet promo code: **T9PZOGI**

If booking through a travel agent, you will also need to use **YYT03**.

For details on how to complete a booking with these discount codes, please visit [westjet.com/convention-discount](http://westjet.com/convention-discount).

### PARKING AT THE DELTA ST. JOHN'S

Overnight parking for hotel guests is \$15<sup>00</sup> plus tax (includes in/out privileges)

Full day parking for non-hotel guests is \$15<sup>00</sup> plus tax

### BRINGING YOUR SPOUSE

Your spouse is welcome to join you at the Conference. The spousal fee is \$275<sup>00</sup> and includes breakfasts, receptions, evening meals and entertainment. Check with the hotel for available daytime activities and outings.

### ATTIRE

Casual dress is appropriate for all Conference events.

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If you have any questions about the conference, please contact us at:

Tel: (902) 835-0391 or [atlantic@cpbi-icra.ca](mailto:atlantic@cpbi-icra.ca)

[www.cpbi-icra.ca](http://www.cpbi-icra.ca)