CANADIAN PENSION & BENEFITS INSTITUTE

CPBI SOUTHERN ALBERTA REGION

CPBI Southern Alberta
Benefits 101

Wednesday, May 17, 2017 7:30 – 11:30 am

Fairmont Palliser Hotel, 133 – 9th Avenue SW

7:30 - 8:00 am Registration & Breakfast

8:00 - 9:05 am Session 1

Topic **Group Benefits – Starter Kit**

Speaker ***Kenneth McDonald, Senior Consultant, Morneau Shepell***

Description This session will focus on benefits basics including:

- Why employers offer benefits
- Group Insurance Principles, Parties and Plans
- Underwriting and pricing group benefits
- Benefits trends

Biography Kenneth MacDonald is a Senior Consultant with 25 years of group benefits experience, which includes working in human resources for three large Calgary based energy companies.

His experience also includes consulting roles with global and boutique consulting firms and underwriting and leadership roles at a large national insurance company. He has designed flex plans, managed the merger of benefit programs for two Canadian energy giants and implemented benefit plans in counties around the globe including the United Kingdom, Trinidad and Tobago and Libya.

Ken is one of Benefits Canada magazine's on-line Expert Panelists, a Canadian Pension and Benefits Institute Regional Council member, and an experienced Toastmaster.

9:05 – 10:10 am Session 2

Topic **Flexible Benefits – The Past, The Present and The Future**

Speaker ***Tyler Bergh, Director, Business Development (Prairie Region), Sun Life Financial***

Description This session will focus on the fundamentals of flexible benefits including details on considerations in the design, administration and pricing of flexible arrangements. The session will include a discussion on an array of design options in adding flexibility to a plan, including flexible spending accounts, modular plans and cafeteria style plans.

Biography As Director, Business Development, Tyler Bergh leads the sales and service teams in the Prairies Region (Calgary, Regina and Winnipeg). In overseeing the team's management of their accounts, Tyler is responsible for promoting strong

	relationships with Sun Life's customers and their advisors, and for ensuring exemplary service delivery throughout the life of each plan. Tyler joined Sun Life in 2002 and brings to his role 15 years of group benefits experience, including account management, underwriting and financial analysis. He holds a Bachelor of Commerce from the University of Calgary, specializing in risk management and insurance, and a Certified Employee Benefits Specialist (CEBS) designation.

10:10 – 10:25 am	**Break**

10:25 – 11:25 am	**Session 3**
Topic	**Administration and Communication – What You Need to Know**
Speaker	***Shannon Hughes, Benefits & Retirement Consultant, Hillcrest Financial*** ***Don Forbes, Regional Sales Director, Ross Benefits Group***
Description	Taking on the administration of an employee benefits plan is no small feat and all too frequently the implications of this responsibility are downplayed. This session will focus on Roles and Responsibilities of Benefits Plan Administration and the Four Pillars of Exceptional Administration. It will help attendees become familiar with the roles and responsibilities of a benefits plan administrator, help to identify and circumvent potential liability, highlight best practices that can be implemented right away and some practical aspects of benefits communication.
Biography	As Regional Sales Director, Don Forbes leads the sales team for western Canada. He helps design innovative plans for a wide range of clients and preferred advisors alike, leveraging state-of-the-art technology to provide unparalleled insight and service. His over 30 years of benefits knowledge includes underwriting and financial management, plan design, benefit/plan taxation, administration processes and procedures, claims practices and current developments in the benefits field. Don has his Certified Employee Benefits Specialist (CEBS) designation, a past CEBS instructor and is currently serving on both the Southern and Northern Alberta Regional Councils of the Canadian Pension and Benefits Institute. Shannon Hughes' role as a Benefits and Retirement Consultant sees her designing, implementing and overseeing a wide variety of solutions for the plan sponsors that she works with. Her background working with a large international insurance company provided valuable expertise in plan administration, claims adjudication, communication and underwriting principles. The opportunity to work exclusively with plan sponsors on their retirement savings plans rounded out the knowledge that Shannon required to provide comprehensive guidance to clients in developing effective programs for their employees. Shannon is an active volunteer with the Canadian Pension and Benefits Institute on several committees. In addition, she is a part of the Toastmasters organization and

	also sits as a director on the Families Matter board.
11:25 – 11:30 am	**Close**