CPBI Ontario Council - 2016-2017

Chris Bromley, Consultant, Accompass

Chris has over a decade of experience in the group benefits industry. Prior to joining Accompass in 2014, Chris worked as Director of Sales at one of Canada's largest health and dental claims adjudicators.

Chris has a BA in Communications, is a Certified Financial Planner (CFP), Ontario Life Insurance License holder, and is actively working towards his CEBS designation (currently has GBA designation). Chris has been an active member of the CPBI Ontario Regional Conference Committee since 2012 and is honoured to join the CPBI Ontario Council.

Ray Desai, Director, Asset Owner Group, FTSE Russell

Ray is currently regional director of the Asset Owner Group at FTSE in Canada. FTSE is a global leader in indexing and analytics solutions. In this role, Ray is responsible for driving revenue growth and index education among the asset owners. Prior to this, Ray was Director of Buyside Sales and Client Development at Thomson Reuters and as VP Institutional Equities at TD Securities. Ray earned his Bachelor of Commerce in Finance at Ryerson University and is actively involved in several charitable organizations.

Ryan Gibbons, Partner, Davis Martindale Accountants

Ryan holds a Bachelor of Commerce degree from the University of Windsor and received his Chartered Accountant professional designation in 2006. Ryan spent the first 10 years of his career with Ernst & Young focusing on the delivery of assurance services to clients in Toronto and Southwestern Ontario with a focus on pension plans and manufacturing companies. Ryan joined Davis Martindale in 2014 and is leading the Firm's pension plan practice.

Caroline Helbronner, Partner, Blake, Cassels & Graydon

Caroline's practice relates primarily to pension, benefit and compensation issues, as well as related investment arrangements and tax matters. She advises employers, financial institutions and consulting firms on pension and benefit issues arising in a wide range of circumstances, including surplus and contribution holiday disputes, cross-border situations and corporate transactions. She also advises extensively on matters related to ongoing compliance with relevant legal and regulatory requirements.

In addition, Caroline is involved with the design, drafting and implementation of a variety of pension, retirement and benefit plans, and related funding arrangements and investment vehicles.

CPBI Ontario Council - 2016-2017

Catherine Jay, Director, Governance & Plan Management,
CADA 360 Employee Benefits Plan and Retirement Savings Plan

Catherine has over 35 years' experience in employee benefits insurance. She started her career in the industry with an insurance company in Toronto and Vancouver and was then Vice President of a major Ontario consulting and third party administrator. She has extensive consulting experience, combined with plan administration services to both public and private sector organizations and associations such as the Retired Teachers of Ontario, the Ontario Nurses Association, the Federal Superannuates and the Quarter Century Club of the Ontario Provincial Government.

Catherine joined the Canadian Automobile Dealers Association (CADA) in 2007, where she manages the CADA 360 Health and Welfare Trust. The $200 M plan currently provides best in class coverage to over 1800 dealerships nationally, protecting over 74,000 employees and their families.

Gabriela Jeffrey, Senior Business Development Manager, Desjardins

Gabriela is responsible for Group Retirement Savings business development and for maintaining outgoing relationships with consulting actuaries across Ontario. She manages all aspects of the relationship with these valued business partners and is their ultimate point of contact.

She holds an undergraduate degree in Economic Development from the University of Western Ontario and postgraduate diploma in International Marketing.

Yves Lacroix, Group Benefits Account Executive, Manulife

In his 20+ years of experience in the Group Insurance Industry, Yves has held various positions including Group Benefit Plan Administrator, Principal Consultant, Corporate Account Executive and Director, Sales and Account Management for Manulife Financial. Yves is fluent in French and English.

Yves is known for his constant drive to exceed client expectations and find win-win solutions to complex situations. He has participated in the implementation of rigorous quality standards aiming at exceeding client expectations and has advised numerous plan sponsors on group benefit matters including collective agreement negotiations, complete redesign of benefit plan structure and funding arrangements to meet their strategic objectives.

Yves has been the Chair of CPBI Ontario's Ottawa Chapter since 2007.

Chair CPBI Ontario Council
Martin Leclair, Vice President, Proteus

Martin joined Proteus in January 2012 to lead the development and promotion of Proteus' institutional consulting solutions. Martin plays a key role in developing and maintaining strategic relationships and works as a part of Proteus' business development team.

Prior to joining Proteus, Martin held various leadership roles at major Canadian investment management firms and a large insurance company. He undertook numerous roles in the fields of investment product engineering, marketing, communications and business development.

Upon moving from Montreal to Toronto in 2007, Martin took on the role of heading the defined contribution and defined benefit investment practices of two investment managers.

CPBI Ontario Council - 2016-2017

Cam MacNeish, Senior D.C. Consultant, Eckler

Cam is a Senior DC Consultant at Eckler Limited with over 25 years' experience in the pension and retirement industry. He specializes in the governance, design, administration, and investment review of DB and DC retirement programs. He has served on the Canadian Pension & Benefits Institute's National Board and frequently speaks at conferences on the topics of CAP management and member engagement.

Cam has a Bachelor of Applied Science (Engineering) degree from the University of Toronto and is a Certified Financial Planner, a Fellow of the Life Management Institute and has completed Canadian Securities Courses.

Treasurer, CPBI Ontario Council

Claude Macorin, Principal, Macor Capital Management

Claude is Principal at Macor Capital Management with over 25 years of experience developing and implementing successful investment strategies across a variety of asset classes, including public and alternative investments.

Claude was Managing Director, Investments at the University of Guelph's Office of Investment Management where he was responsible for all aspects of the University's Pension and Endowment investments.

Claude spent 10 years honing his skills as an equity and credit analyst prior to taking on the role of Portfolio Manager at McGill University where he successfully managed a Canadian equity portfolio, real estate and private equity/infrastructure, and acted as an internal consultant.

Vice Chair, CPBI Ontario Council
Natasha Monkman, Partner, Hicks Morley Hamilton Stewart Storie

Natasha is a pension and benefits lawyer in Hicks Morley's Toronto office. She advises both public and private sector employers on a variety of plan administration, compliance and governance matters relating to their employee benefit plans and pension plans.

Natasha routinely assists clients with claims regarding benefit entitlements, including upon marriage breakdown and the death of an employee. She has also advised employers and plan administrators regarding mergers and acquisitions, alternative plan designs and funding issues.

Natasha also regularly advises municipal and school board employers regarding their obligations as participating employers in large jointly sponsored pension plans.

Kim Ozubko , Partner, Miller Thomson

Kim is a Partner in the Toronto office of Miller Thomson's Pension and Benefits Group. A frequent speaker and author in the areas of pensions and benefits law, Kim advises clients in all areas of the firm's pensions and benefits practice. Prior to joining Miller Thomson, Kim practiced pensions and benefits law at several international law firms and at an international pension consulting firm. Her current practice focuses on all legal and regulatory matters relating to the implementation, administration and governance of pension, group benefit and other retirement savings plans. This includes advising clients on the development of pension and other employee benefit plans as well as on plan mergers and conversions, pension fund investment, fiduciary duties and ongoing regulatory compliance.

CPBI Ontario Council - 2016-2017

	**Tracey Riccardi, Manager Human Resources, Thompsons Limited** Tracey received her education at the University of Windsor. She entered the Human Resources field at Caesars Windsor in 1994, specializing in Employee Benefits in the areas of Compensation, Pension, Payroll, Disability, Employee Engagement & Contracts. Tracey joined Green Shield Canada in 2012 as Client Service Manager to approximately 20 staff members across Southwestern Ontario, Calgary and the Vancouver Sales offices. In this role she was responsible for the coordination of all aspects of the Service Teams and provided mentorship, succession planning, talent management, new hire orientation and organizational effectiveness to each team member in order to advocate superior customer service skills to Plan Sponsors and Plan Advisors. She recently joined Thompsons Limited in an HR leadership role where she is responsible for all elements of HR. Tracey believes in making a difference by putting the needs of others first, is committed to excellence and innovation and believes that a great team is critical to success.
	**Shenagh Rosa, Manager, Pension Compliance and Communications, United Church of Canada** Shenagh Rosa is a Pension Compliance and Communications Manager for the Pension Plan of the United Church of Canada, which has over 9000 members. Recently, Shenagh took the lead on a redesign of the Annual Report of the United Church Pension Plan and is part of the team overseeing the transition to a new third-party administrator for the church's pension and benefit administration. Prior to joining the United Church, Shenagh held a variety of positions in the Plan Sponsor, Insurance and TPA environments with roles in pension plan management, pension compliance and group benefit consulting and administration. Her 25+ years of working on both the plan sponsor and the insurance side enables her to provide valuable insight on all aspects of benefits and pension. Shenagh is a member of the CPBI Ontario Regional Council and holds the CEBS designation.
	**Christine Van Staden, Vice-President, National Accounts, Great-West Life** Christine has over 28 years of experience in the pension and benefits industry, both in the U.S. and Canada. In her role as Vice-President, National Accounts, Great-West Life, Christine is responsible for leading the National Accounts team in selling and retaining Group Retirement and Savings business in the large case segment through the consultant channel. She has a Bachelor of Science (Honours) degree in Business Management from the University of Tennessee. Christine also serves in a leadership capacity with the CPBI Ontario Council as Chair of the 2016 Conference.
	Past Chair, CPBI Ontario Council **Joyce Stephenson, Gleste Solutions**